PeopleSoft 9.0
Basics

CLC Student Administration System
PeopleSoft 9.0 Basic Users Manual

TABLE OF CONTENTS

1. INTRODUCTION 1-1

2. GETTING STARTED 2-1

LOGGING INTO THE NETWORK 2-1

ACCESSING PEOPLESOFT 2-1

GUIDELINES FOR CREATING PASSWORDS 2-2
SETTING UP THE CLC INTRANET AS YOUR HOME PAGE 2-5

TIMING OUT IN THE SYSTEM 2-6

LOGGING OFF OF PEOPLESOFT 2-7

3. USING THE MENUS 3-1

MENUS 3-1

USING MENUS 3-2

DISPLAYING AND HIDING THE MENU PAGELET 3-3

USING THE MENU PAGELET 3-3

OPENING A PAGE FROM THE NAVIGATION MENU 3-4
USING THE MENU SEARCH FUNCTION 3-6

PRIMARY ELEMENTS OF WINDOWS 3-9

NAVIGATION HEADER 3-9

TOOLBAR BUTTONS 3-10

WORKING WITH COMPONENTS AND PAGES 3-11

MOVING BETWEEN PAGES OF A COMPONENT 3-13

SAVING DATA IN A COMPONENT 3-14

COMPONENTS WITH RELATED LINKS 3-15

4. GETTING HELP 4-1

FERPA (FAMILY EDUCATIONAL RIGHTS AND PRIVACY ACT) 4-3

5. OPENING A NEW WINDOW 5-1

NEW WINDOW FUNCTION 5-1

TIPS FOR USING THE NEW WINDOW FUNCTION 5-2

6. IDENTIFYING TYPES OF DATA ENTRY ELEMENTS 6-1

TYPES OF DATA ENTRY FIELDS 6-1

REQUIRED DATA ENTRY FIELDS 6-2

7. NEWER FEATURES 7-1
USING SPELL CHECKING 7-1
USING THE DOWNLOAD TO EXCEL FUNCTION 7-2
USING GRID TABS 7-3
USING NOTIFY BUTTON 7-5
8. USING PAGE ACTIONS TO VIEW DATA 8-1
PAGE ACTION BUTTONS 8-1
EFFECTIVE DATES 8-2
9. USING THE SEARCH FUNCTION 9-1
USING SEARCH CRITERIA 9-1
BASIC SEARCH PAGE 9-1
USING SEARCH OPERATORS 9-5
SAVING SEARCH CRITERIA 9-8
INCLUDE HISTORY AND CORRECT HISTORY FUNCTIONS 9-10
SEARCH PAGE BUTTONS 9-10
SEARCH RESULTS 9-11
SINGLE COLUMN SEARCH RESULT LIST 9-11
SUBDIVIDED SEARCH RESULT LIST 9-11
LIST WITH MESSAGE TO NARROW SEARCH 9-12
MOVING BETWEEN RECORDS IN A SEARCH LIST 9-13
10. PRINTING 10-1
PRINTING OPTION #1 – FILE > PRINT 10-2
PRINTING OPTION #2 – PRINTER FRIENDLY VERSION 10-3
PRINTING OPTION #3 – RIGHT-CLICK 10-4
PRINTING OPTION #4 – RIGHT-CLICK FOR INFORMATION THAT IS LARGER THAN A SCREEN 10-4
11. USING 19TH 41ST HOUR 11-1
12. DATA NAVIGATION 12-1
TABBING BETWEEN FIELDS 12-1
SCROLL AREAS 12-1
COLLAPSIBLE AREAS 12-2
SEARCHING FOR BIO/DEMO DATA IN THE SYSTEM 12-2

13. SETTING USER DEFAULTS 13-1

FIELDS WITH DEFAULTS VALUE OPTIONS 13-6

USER DEFAULTS 1 13-6
USER DEFAULTS 2 13-6
USER DEFAULTS 3 13-7
USER DEFAULTS 4 13-7
ENROLLMENT OVERRIDE DEFAULTS 13-8
COMMUNICATIONS SPEED KEYS DEFAULTS 13-8
USER 3C GROUPS SUMMARY DEFAULTS 13-8

14. USING SELF SERVICE 14-1

15. WORKING WITH FAVORITES IN PEOPLESOFT 9.0 15-1

ADDING FAVORITES 15-1

SEQUENCING AND EDITING FAVORITES 15-2

DELETING FAVORITES 15-4

16. PERSONALIZATIONS 16-1

USING MY PERSONALIZATIONS 16-1

17. CLEARING YOUR BROWSER'S CACHE 17-1

1. INTRODUCTION

The College of Lake County has been using PeopleSoft software to manage the Human Resources and Student Administration processes of the college. The college has adopted a new version of the PeopleSoft system, PeopleSoft 9.0.

The new version of PeopleSoft includes all of the functionality of the previous PeopleSoft 8 system. Additionally, the PeopleSoft 9.0 system has some additional functionality, including bookmarking within the application, downloading data to Excel, and sending e-mails from within PeopleSoft.

This manual includes step-by-step instructions on how to use the new system and how the navigation has changed. The table of contents at the beginning of the document outlines each of the areas covered in this manual.

IMPORTANT NOTICE

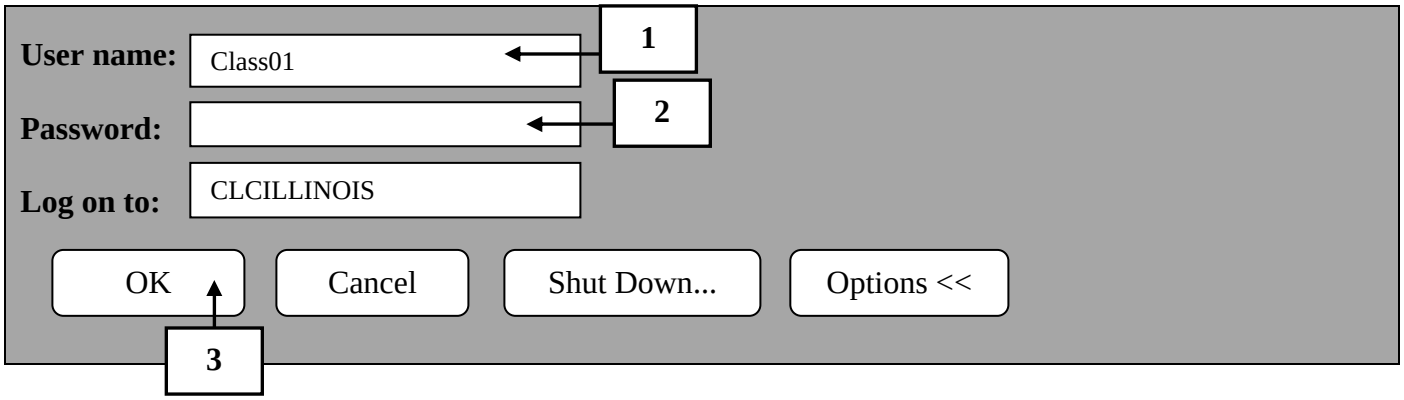
The screen snaps throughout this manual reflect the PeopleSoft 9 system as of 9/01/08. You may notice slight screen differences, between those in this manual and the “live” system, if the PeopleSoft system has changed after 9/01/08.

2. GETTING STARTED

LOGGING INTO THE NETWORK

When you first turn on the computer you will need to log into the network. You will see a login box as shown below.

1. Enter your **Network User name.**
2. Enter your **Network password**.
3. Click **OK.**



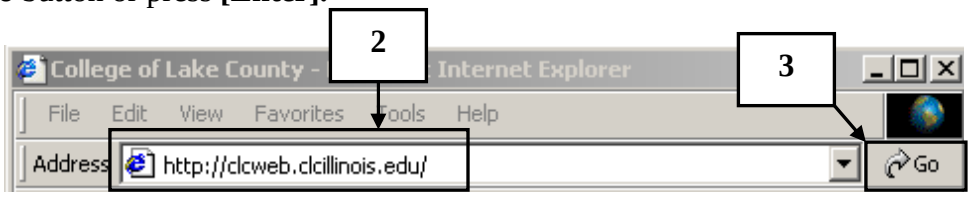
ACCESSING PEOPLESOFT

Once you have logged onto the network, you will need to access the web-based system. To access the system:

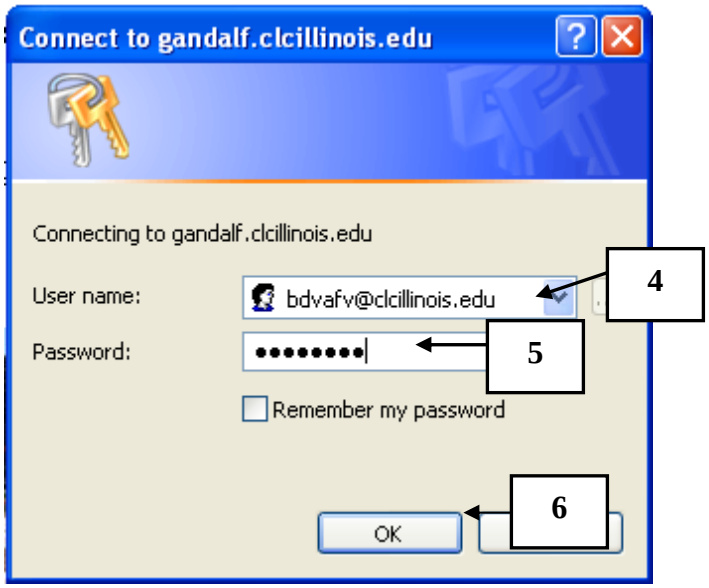
1. Bring up **Internet Explorer**.

You can click on the Internet Explorer icon, , in your taskbar.

2. Type **http://clcweb.clcillinos.edu**.
3. Press the **Go** button or press **[Enter].**



4. Type in your **Network User Name** followed by **@clcillinois.edu** and press **[Tab]**.
5. Type in your **Network Password** and press **[Tab]**.
6. Click on the **OK** button or press **[Enter]**.



GUIDELINES FOR CREATING PASSWORDS

A compromised password not only puts a user's E-mail and files at risk, but may also expose sensitive CLC data and systems. All members of the CLC community are responsible for taking the appropriate steps to select and secure their passwords. It is also a must to have a strong password policy in place to meet regulatory and audit requirements. This document outlines the guidelines and requirements for choosing, managing, and protecting strong passwords at CLC.

One of the most common methods that attackers use to guess passwords is known as a *brute force attack*. In a brute force attack, the attacker systematically tries possible passwords until he manages to break into an account. Attackers frequently use dictionary files to generate lists of possible passwords. Choosing passwords that are easy to remember but hard for an attacker to guess, will significantly improve the security of the computer and data.

The following guidelines should be considered when creating a password:

Steps 1 – 3 are Required

1. At least **eight** characters long
2. The first character **MUST BE AN ALPHA CHARACTER AND CAPITALIZED.**
3. **Must** contain at least one numeric character
4. May contain at least one punctuation or symbol character (e.g. !@#$%^&*()_+|~-=\`{}[]:";'<>?,./)
5. Are not trivially derived from the user's CLC Network ID, name, or a dictionary word.

6. Avoid using dictionary words in your passwords. This includes foreign language words, slang, jargon, and proper names.
7. Avoid using passwords that contain words associated with CLC, such as lancers, Grayslake, brandel, etc.
8. Avoid common misspellings and substitutions in your passwords (e.g. replacing "e" with "3" or "i" with "1")
9. Avoid using passwords that are based on any personal information, such as name, user ID, birthdates, addresses, phone numbers, or relatives' names.
10. Do not use sample passwords, such as the ones included in this guide.

Think up a phrase or part of a book, poem, or song and use part of it to form a memorable password. For example:

Only **50 m**ore **d**ays **u**ntil **I g**raduate **f**rom **SFS!,** would be **O50mduIgfSFS!**
All of **G**aul **i**s **d**ivided **i**nto **3 m**ain **p**arts, would be **"AoGidi3mp."**

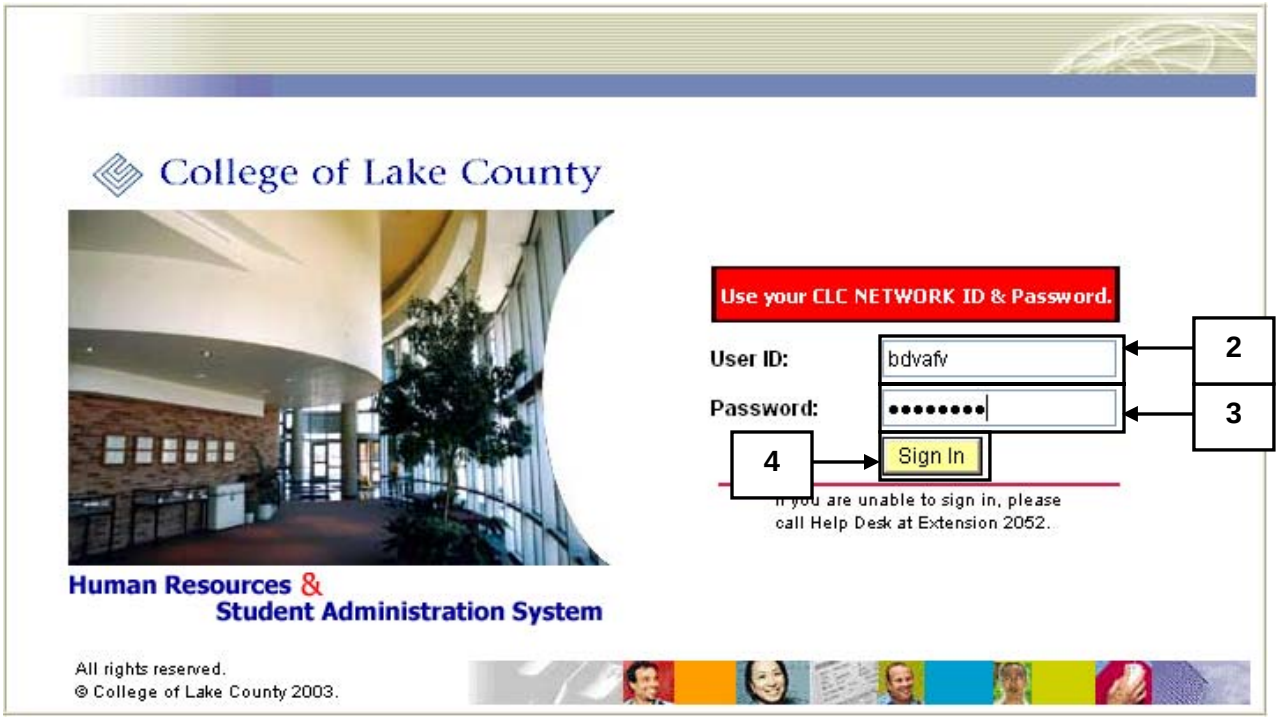
These guidelines were taken from an e-mail composed by Ratnakar Nanavaty 6-27-05.

Guidelines for Protecting Passwords

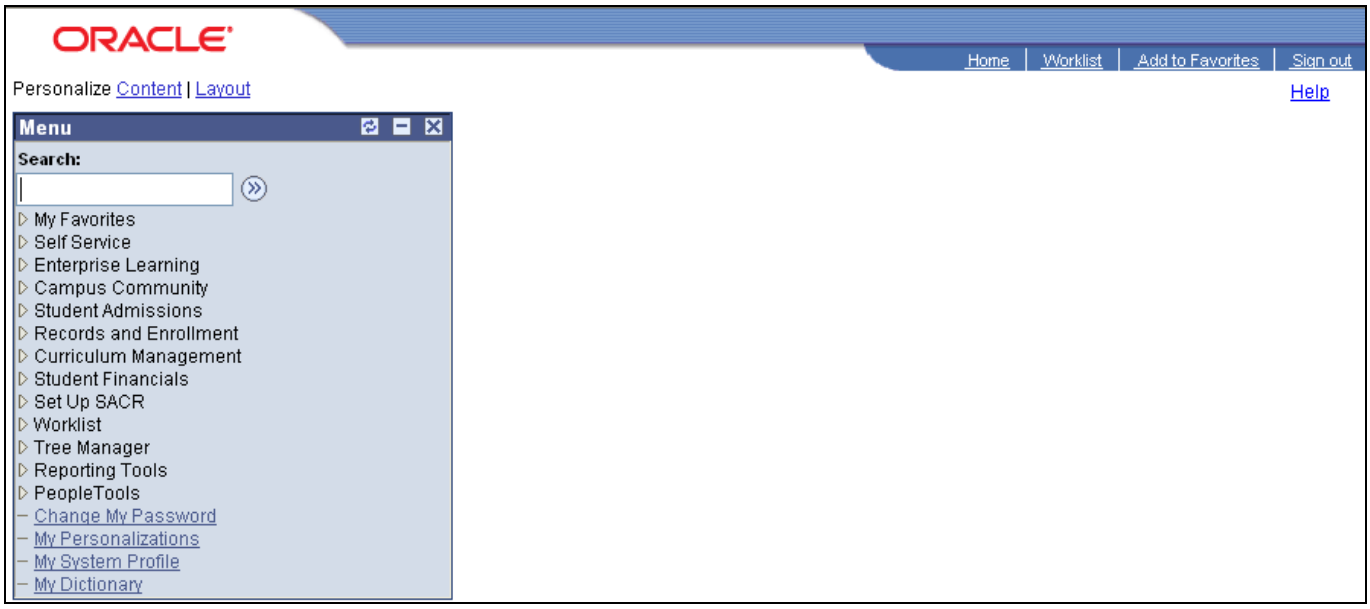
1. Password security is the responsibility of the end user. The end user will be held accountable for any misuse of guessed, disclosed, or compromised passwords.
2. Do not share passwords with anyone, including supervisors, administrative assistants, secretaries, and technology service providers. It is against CLC policy for a technology service provider to request a user's passwords. If someone demands a password, refer them to this document or have them call someone in the CLC Information Security Office.
3. Do not use the CLC Network ID password for any other account or service at CLC or elsewhere. Your CLC Network ID password should be unique from any other password used.
4. Avoid using the same passwords for CLC accounts as for other non- CLC access (e.g., personal ISP accounts, free online E-mail accounts, instant messaging accounts, other online services, etc.). This will limit exposure if any of passwords are compromised.
5. Avoid storing passwords within applications or using the "Remember Password" feature (e.g. Netscape Messenger, Internet Explorer, etc.). These features typically do not adequately protect passwords, and it may be possible for a computer virus or unauthorized user to gain access to this information.
6. Do not write passwords down or store them anywhere in the office. Do not store passwords in a file on any computer system (including PDAs or similar devices) without using strong encryption.
7. If the account or password may have been compromised, report the incident to the CLC Information Security Office and change the password immediately.

1. Near the top of the page, under the Faculty & Staff Resources section, click on the **Student Administration & Human Resources - PRODUCTION** link on the page.

2. Enter your **User ID**.
3. Enter your **Password**.
4. Click the **Sign In** button or press Enter.



The new PeopleSoft 9.0 home page will display, as seen below:



Note: Screen shots in this manual may include areas of the system where you do not have access.

Tip: You may want to consider setting the CLC Intranet home page as a Favorite in Internet Explorer, so that you can quickly access the PeopleSoft log in screen. For help with this, refer to the "Working with Favorites in Internet Explorer" section of this manual. Otherwise, you my want to make the CLC Intranet your home page on your PC, so that it will automatically come up when you launch Internet Explorer. Instructions on setting up the CLC Intranet as your home page follow.

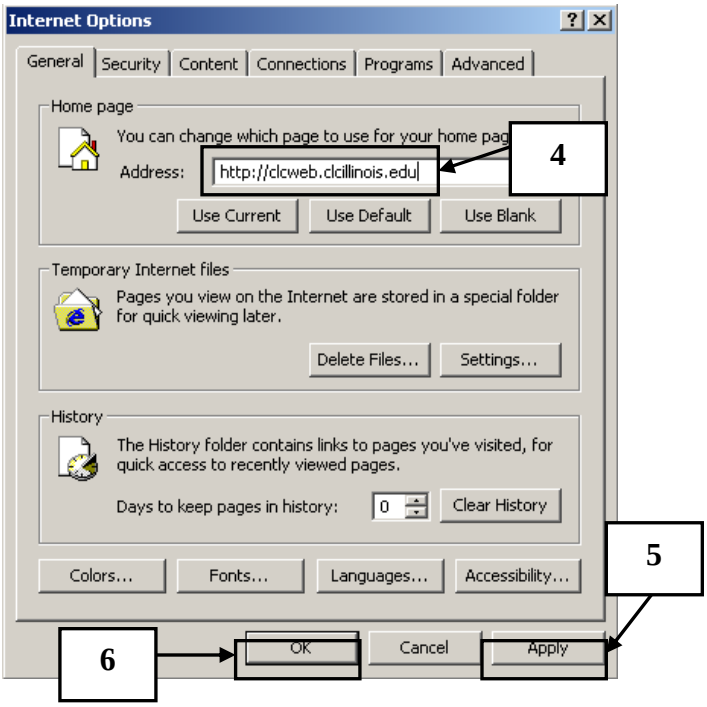
SETTING UP THE CLC INTRANET AS YOUR HOME PAGE

To make the CLC Intranet page your home page:

1. Launch **Internet Explorer** by clicking on the Internet Explorer icon, .
2. Click on **Tools** in the menu bar of Internet Explorer.

3. Click on **Internet Options.**

4. In the Internet Options window in the Home page section at the Address line type: **http://clcweb.clcillinois.edu.**
5. Click the **Apply** button.
6. Click the **OK** button.



The CLC Intranet home page will now appear on your PC whenever you launch Internet Explorer.

TIMING OUT IN THE SYSTEM

For security purposes the system automatically logs you off after 20 minutes of inactivity. If you are inadvertently logged off the system, due to idle time, and wish to return to your application, the following screen will appear.

1. Click the **Sign in to PeopleSoft** link to return to the login screen.

! Warning ! Please keep in mind that anything you have entered, and not saved, will be lost if you are inadvertently logged off the system.

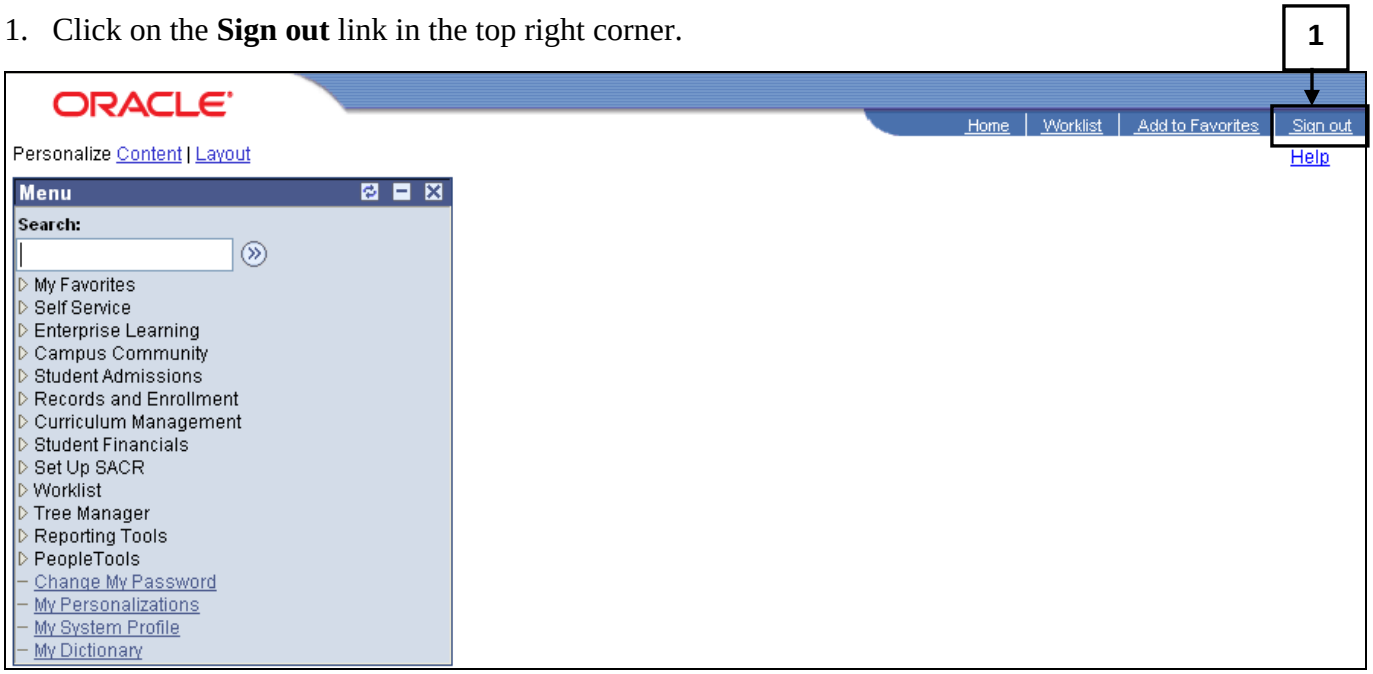
Once you have clicked the sign in link, the login screen will appear, and you can once again login to the system. Therefore, it is always best to regularly save your work, especially before you leave your workstation for an extended period of time, because anything entered and not saved will be lost if the system logs you off.

Tip Sign out of the system if you are done using it, or if you will be away from the system for more than 20 minutes. Also be sure to always Lock your computer by pressing [Ctrl]+[Alt]+[Delete] and choose the "Lock Workstation" option, or log off the system completely, when you leave your desk.

LOGGING OFF OF PEOPLESOFT

When you have finished using PeopleSoft or will be away from you desk for 20 minutes or more, you should log off of PeopleSoft. To log off of PeopleSoft:

1. Click on the **Sign out** link in the top right corner.



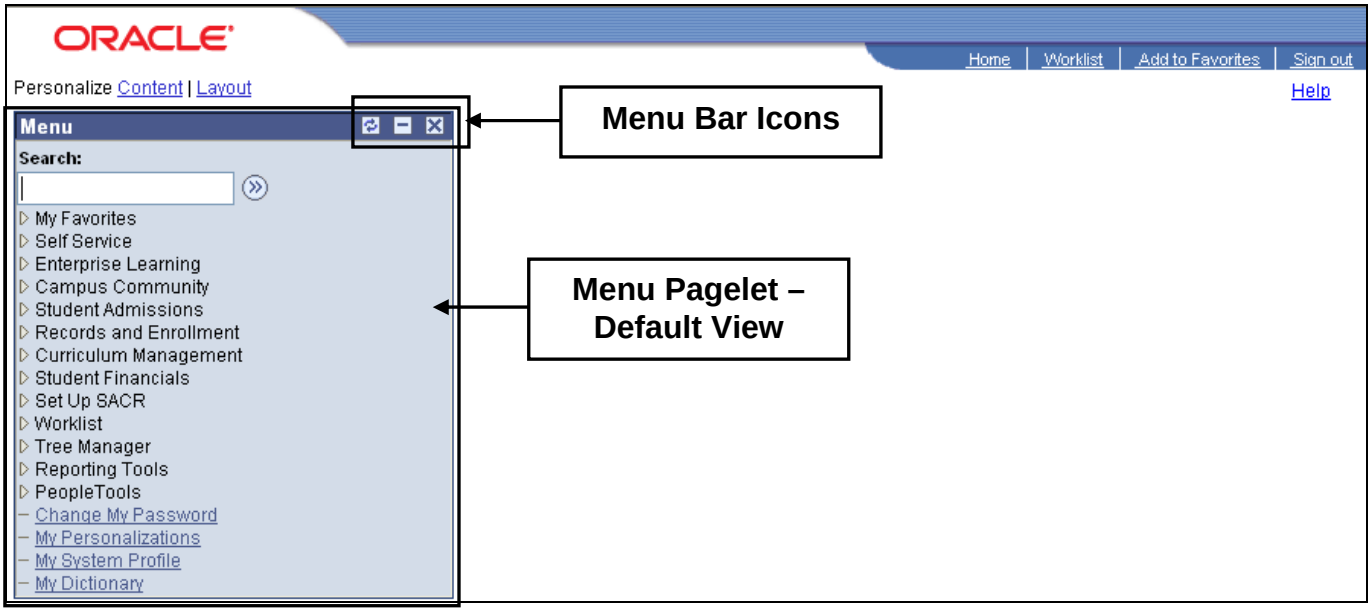
Note You can sign out whenever the "Sign Out" link appears in the toolbar. There is no need to return to the Home page to sign out.

Tip If not available, open a second window and sign out of it. Then close the first window. This will bring up the Sign In screen.

3. USING THE MENUS

MENUS

The PeopleSoft 9.0 system uses menus extensively as navigational tools. When you first log into PeopleSoft 9.0, the homepage will display as seen below. The number of menu items displayed in the Menu window will depend on the security of each user.

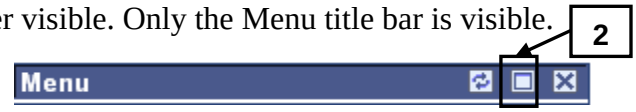


Each window in the PeopleSoft 9.0 system is called a "pagelet". The Menu pagelet above has three Menu bar icons in the title bar at the top. The table below describes the function of each of the Menu bar icons.

Icon	Description
Refresh	Refreshes the window
Minimize	Minimized the window
Close	Removes the window from the home page.

1. Click the **Minimize** button, , in the Menu pagelet.

The Menu pagelet is no longer visible. Only the Menu title bar is visible.



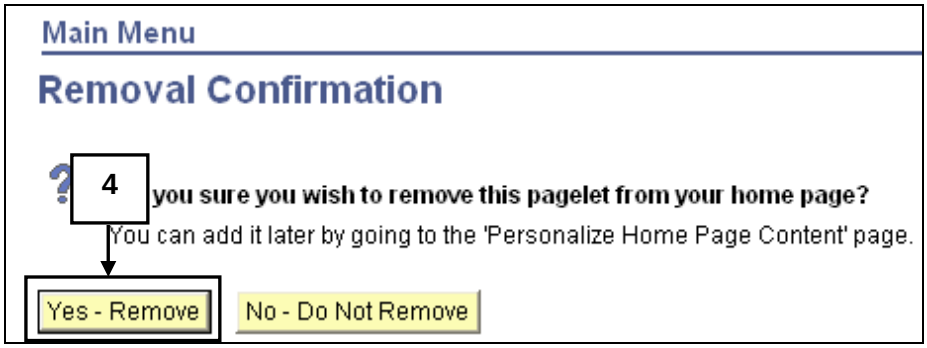
2. Click on the **Maximize** button, , in the Menu title bar.

The full menu screen will display again.

3. Click on the Close button, , in the Menu pagelet.

A Removal Confirmation for the Menu pagelet will display.

4. Click the **Yes-Remove** button.

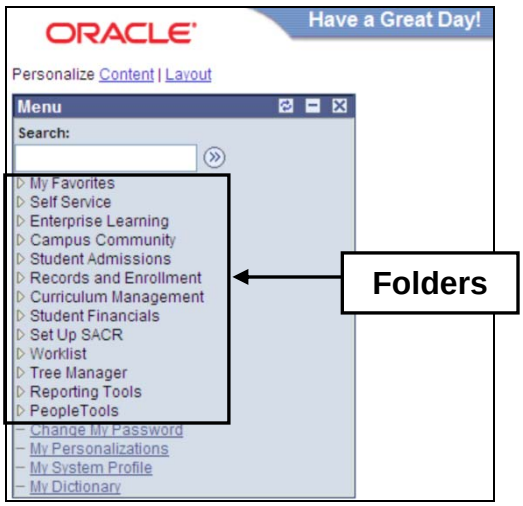


The Main Menu window will no longer display on the screen.

Note: You should only minimize or close the Main Menu when other menus are visible on the screen.

USING MENUS

On the left side of the PeopleSoft 9.0 home page the Menu pagelet is displayed. It contains a list of folders, which provide the primary method for moving through the system. This list contains the areas of the system to which you have access.



Note: The Menu pagelet displays all folders available to the current user. The folders available will vary based on the user's security permissions.

DISPLAYING AND HIDING THE MENU PAGELET

The Menu pagelet can be displayed (expanded) or hidden (collapsed) at any time. To collapse the menu pagelet, click the button. To re-expand the menu pagelet, click the button.

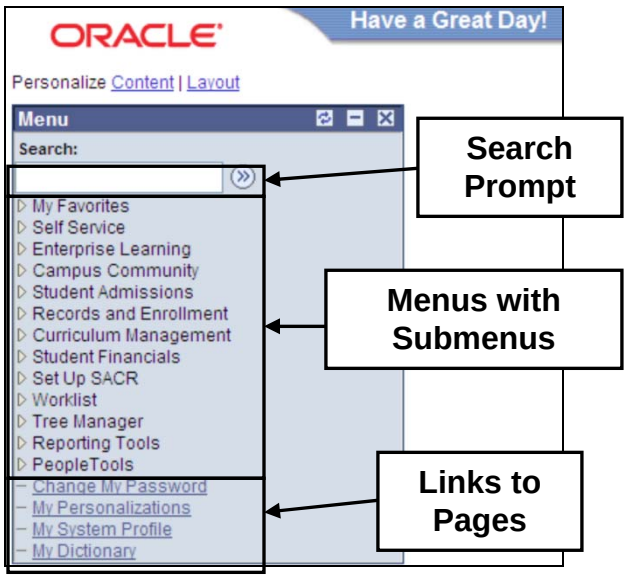
TIP

The **Ctrl** (Control) **Y** hot key combination will also collapse and expand the menu.

USING THE MENU PAGELET

To use the Menu pagelet you may either select a folder (or menu item) in the list or use the search prompt at the top of the window to search for a particular folder.

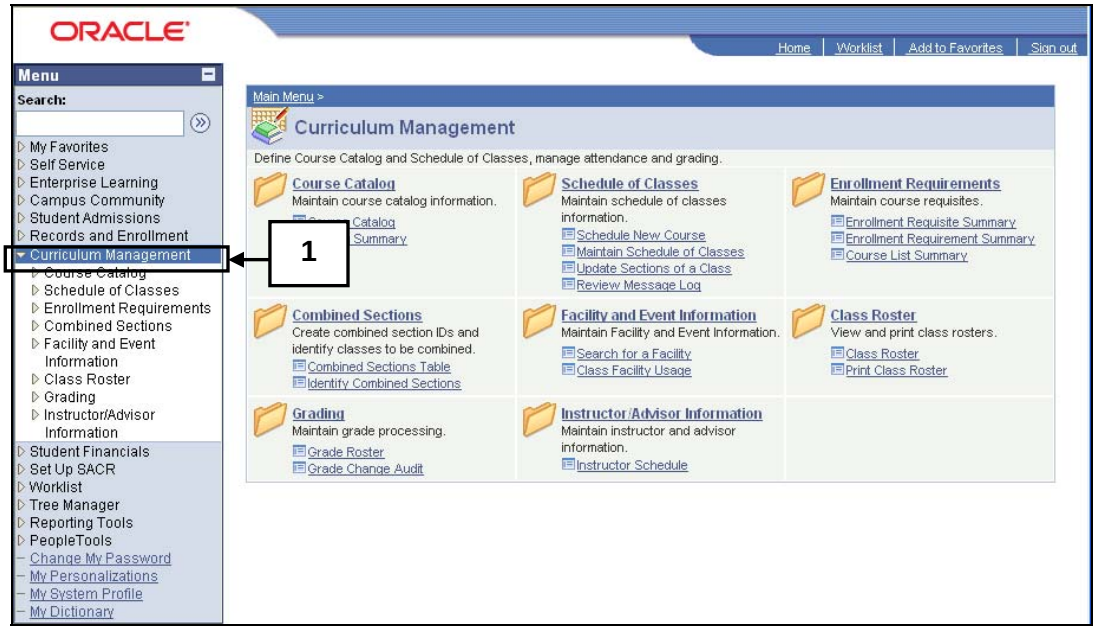
Navigation to pages is accomplished through selections in the Menu. If a Menu selection has other choices associated with it, you will see an arrow pointing sideways towards the selection, . This indicates that there are submenus associated with the menu item. If a Menu choice is open and the additional submenus associated with it are visible, the arrow next to the Menu choice will point downwards, . If a Menu choice navigates you directly to a page, it will have a hyphen in front and be underlined in blue type suggesting that it is a hyperlink to a page.



To select a Menu item, click your mouse on the desired selection. This will expand the associated Menu choice to its submenu. You may also click on any of the page links at the bottom of the Menu pagelet.

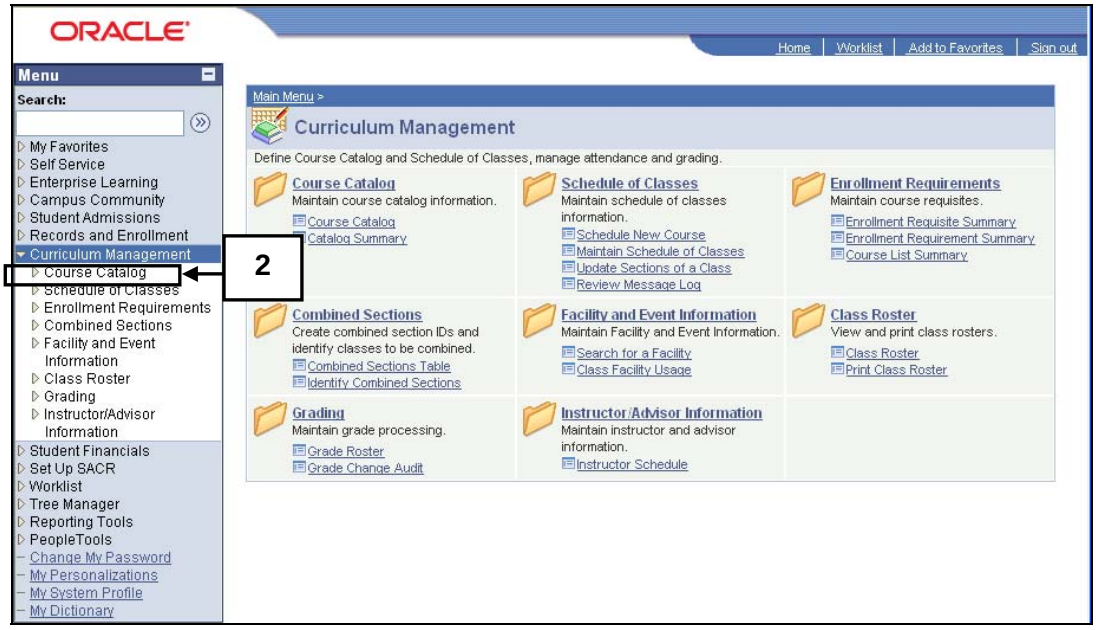
OPENING A PAGE FROM THE NAVIGATION MENU

1. Click on **Curriculum Management** in the Menu pagelet.

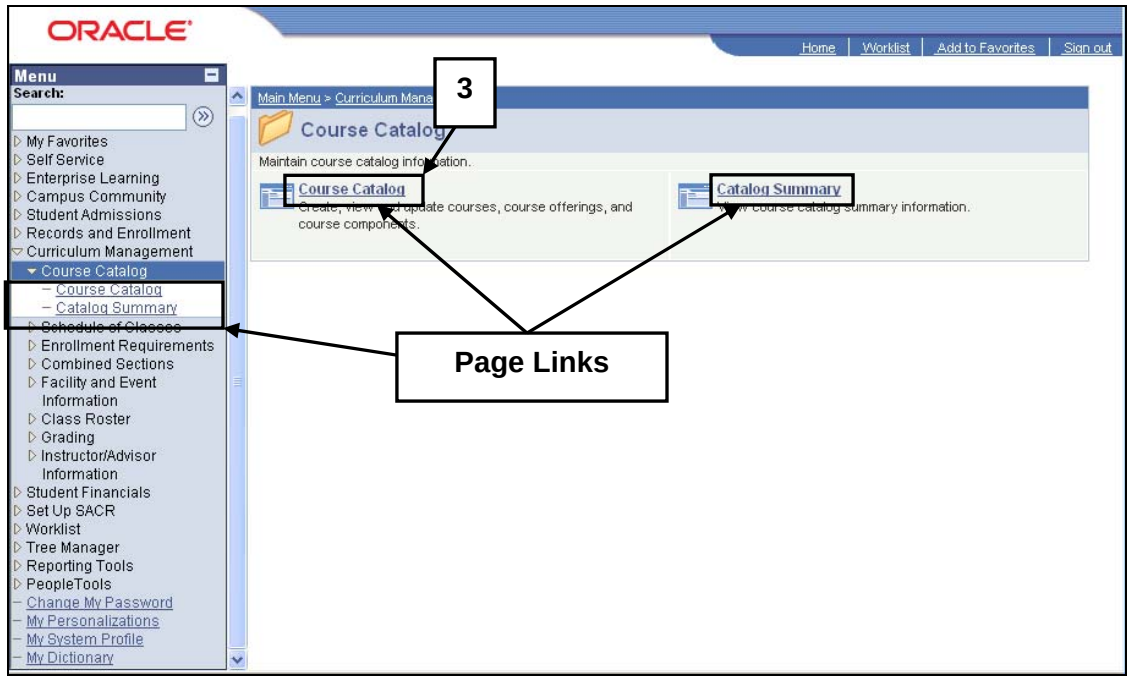


The Curriculum Management menu will expand and the submenus will now be available. The Main Menu pagelet will also be visible as seen to the right. You can access any of the submenu options, Course Catalog, Schedule of Classes, Enrollment Requirements, Combined Sections, Faculty and Event Information, Class Roster, Grading and Instructor/Advisor Information by clicking on the menu item in either the Menu pagelet or the Main Menu pagelet.

2. Click on the **Course Catalog** menu item in the Menu pagelet.

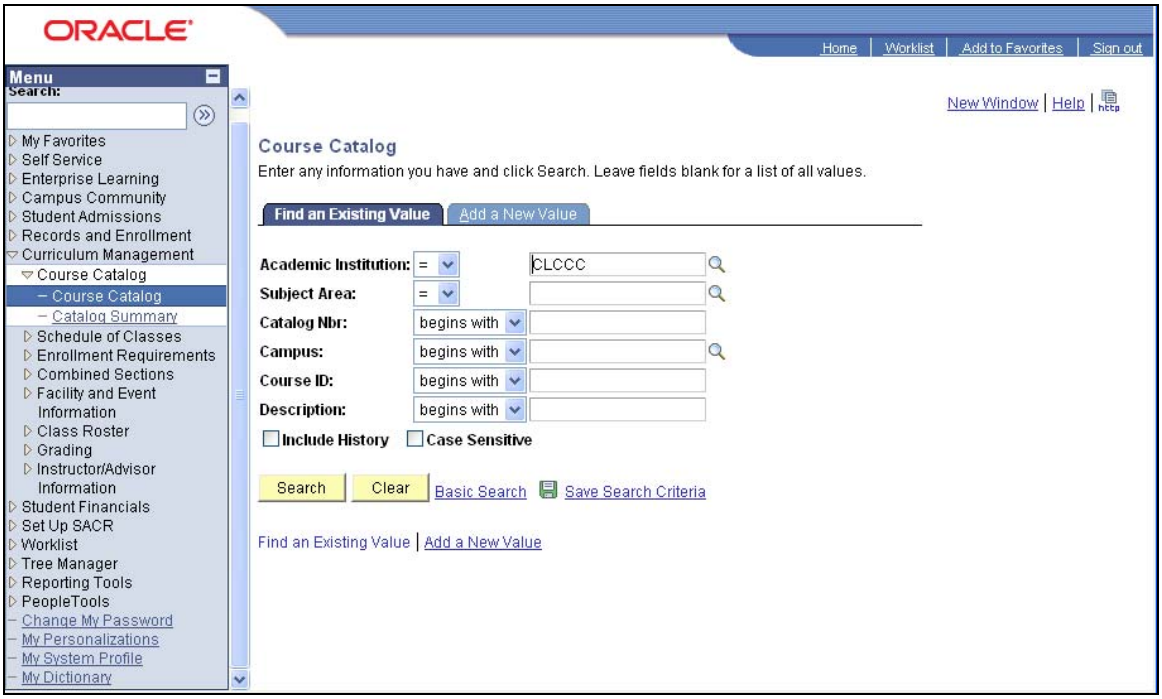


The page links, Course Catalog and Catalog Summary will now be visible in both the Menu and Main Menu pagelets.



3. Click on the **Course Catalog** link in the Main Menu pagelet.

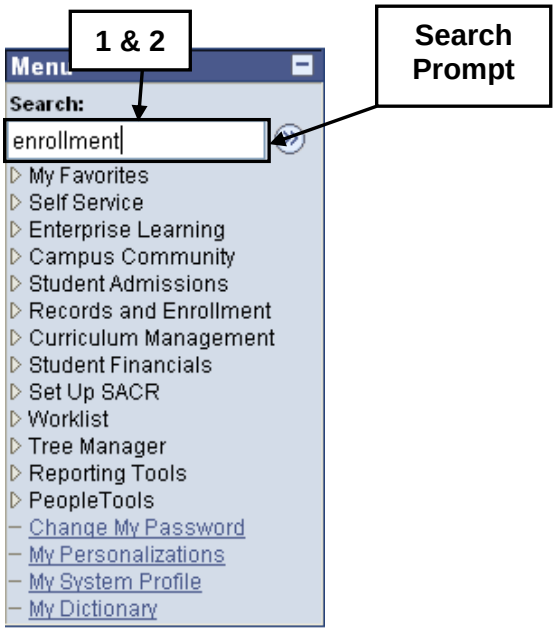
The Course Catalog search screen will display.



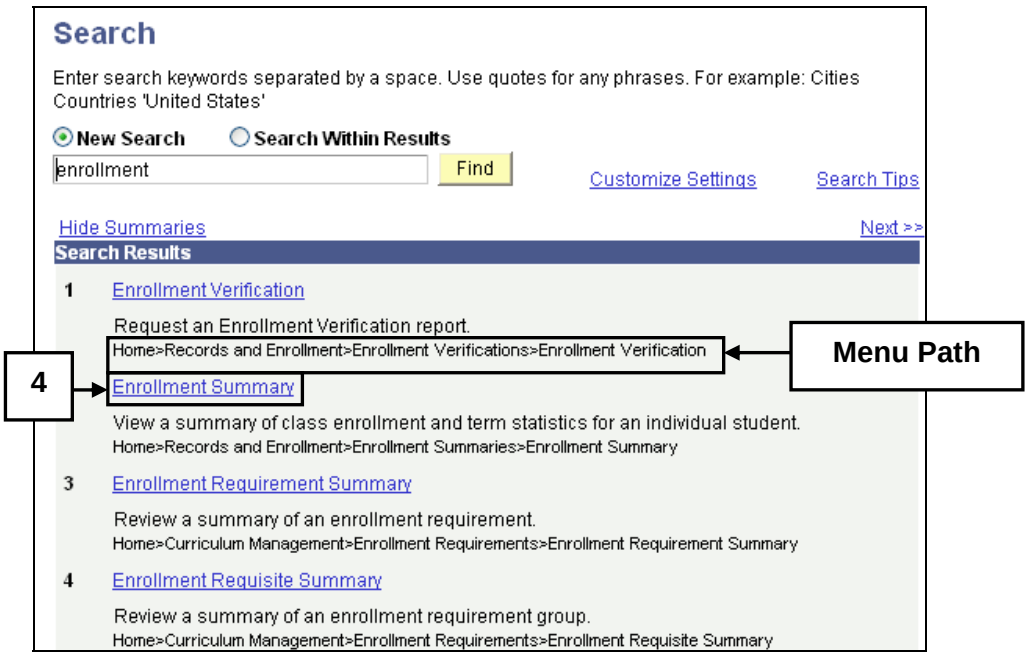
USING THE MENU SEARCH FUNCTION

There is a Search prompt at the top of the menu pagelet. If you are not sure where to find information in PeopleSoft 9.0, simply type in a keyword and then press Enter. We will search for student enrollment information using the search prompt.

1. Click in the **Search: prompt** at the top of the menu pagelet.
2. Type **enrollment**.
3. Press **Enter.**

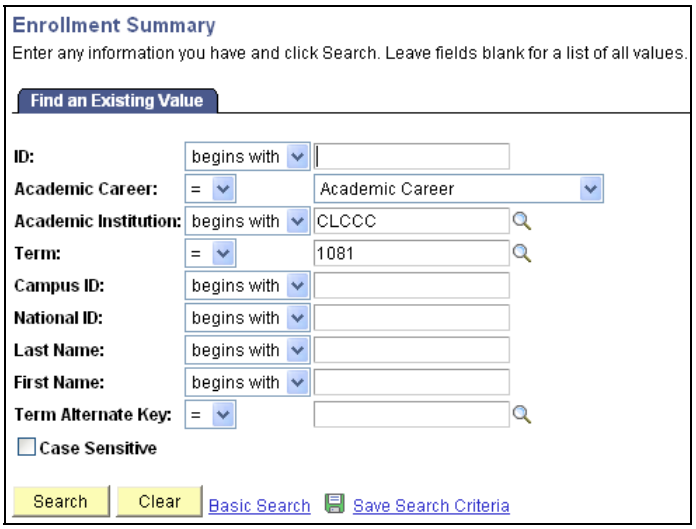


A search screen like the one below will display. A list of each menu item appears as a hyperlink along with a description of the menu. The path to the menu item also displays under the description.

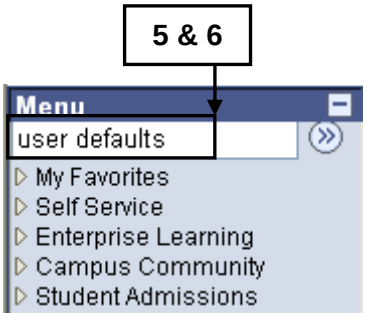


4. Click on the **Enrollment Summary** hyperlink.

The Enrollment Summary search screen appears, as seen to the right. You can then enter your search fields to view enrollment data for a specific person.

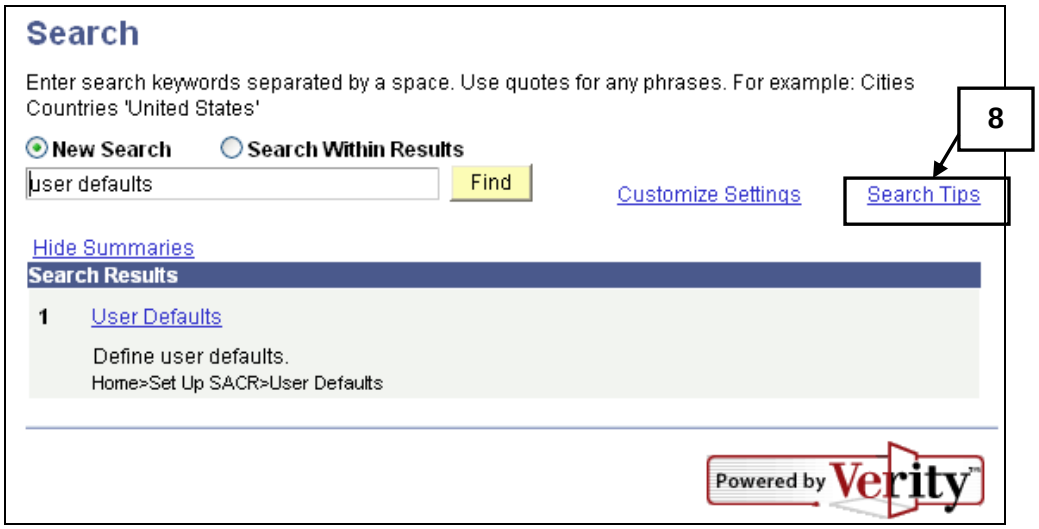


5. Click in the **Search: prompt** again.
6. Type **user defaults**.
7. Press **Enter**.



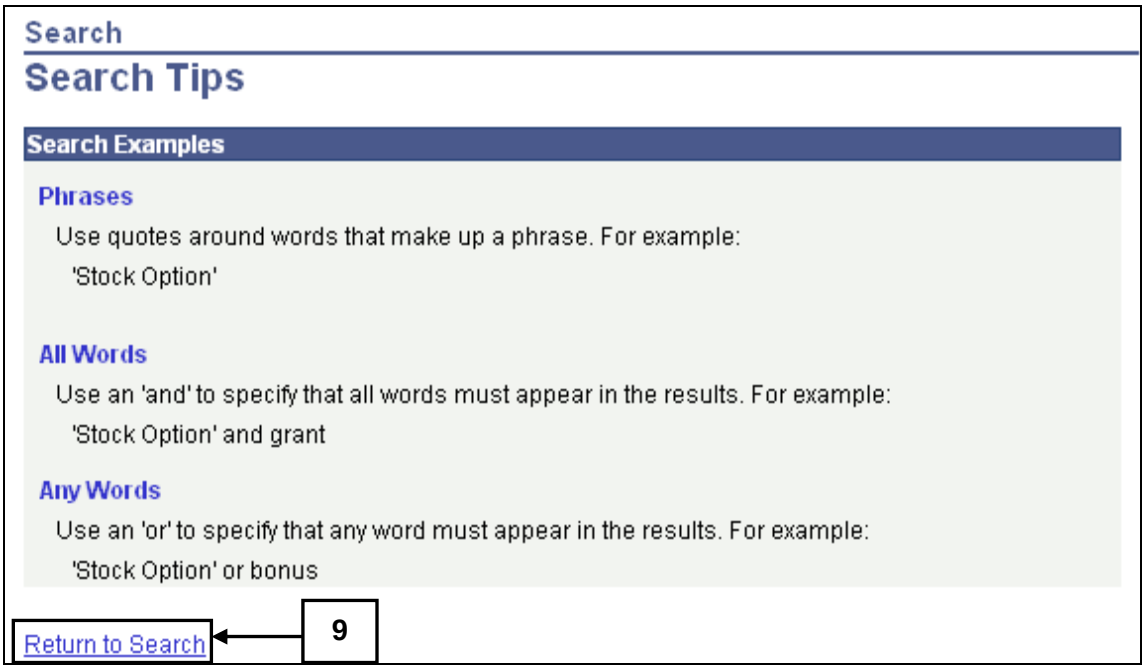
The Search screen will display, as seen below.

8. Click on the **Search Tips** hyperlink.



A list of suggestions for using the Search: prompt will display.

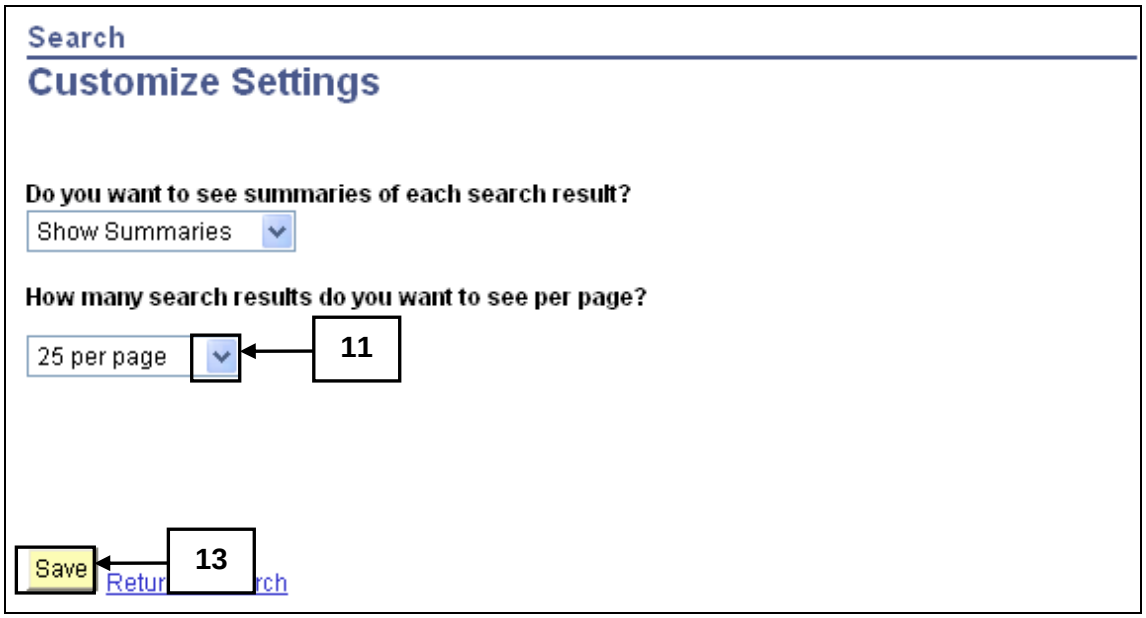
9. Click on the **Return to Search** hyperlink.



The Search screen will display again.

10. Click on the **Customize Settings** hyperlink.

You can customize your search results by hiding summaries and changing the number of search results you would like to see on a page.



11. Click the **down arrow** to the right of 25 per page.
12. Select **10 per page**.
13. Click the **Save** button.

Now when you use the search prompt, your search result lists will display in groups of 10.

PRIMARY ELEMENTS OF WINDOWS

There are several common elements to windows in the system. Understanding these elements and how they function will help you to effectively use the system. Many different types of elements are used to organize information on pages and to allow you to enter data into the system.

NAVIGATION HEADER

The navigation header area remains static as you move through the various areas of the system and appears as follows:

There are three primary buttons on the navigation header:

1. Home
2. Add to Favorites
3. Sign Out

The following table provides information about the buttons contained in the navigation header.

Navigation Header Button	Function
Home	Takes you back to the Home page in the PeopleSoft 9.0 system.
Add to Favorites	Save the current page as a favorite in PeopleSoft 9.0. Once the favorite has been created, you can access it using the My Favorites menu item. Detailed information on using this feature can be found in the Using Favorites section of this manual.
Sign Out	Use to sign out of the system, when you would like to leave Internet Explorer open. Pressing this button will take you back to the PeopleSoft login screen. ***Note*:** Be sure to save your work before signing out.

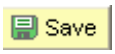
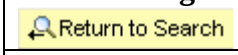
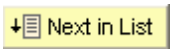
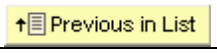
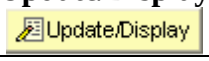
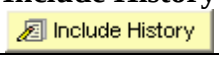
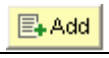
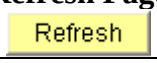
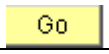
! Warning ! - **ALWAYS USE THE SIGN OUT *OPTION TO LOG OFF OF PEOPLESOFT!*** Do not use the close button in the Internet Explorer browser to end your Peoplesoft session.

TOOLBAR BUTTONS

At the bottom of most pages you will find buttons. These buttons change dynamically, depending on the type of page in use. The buttons come in three different types:

1. search list navigation buttons,
2. page navigation buttons and
3. page action buttons.

The table below provides a list of toolbar buttons along with a description of each:

Toolbar Button	Function
Save 	Saves information you have entered into the page. Generally, you will save when you come to the end of a component. The Save command updates the data for all pages in a component.
Return to Search Page 	Returns you to the last search page used.
Next In List 	Displays the data for the next record in your search results list. The button will be unavailable, or grayed out, if you did not select the record from a search results list, if there was a single row in the list, or if the data displayed is the last record in the list.
Previous in List 	Displays the data for the previous record in your search results list. The button will be unavailable, or grayed out, if you did not select the record from a search results list, if there was a single row in the list, or if the data displayed is the first record in the list.
Update/Display 	Provides access to existing rows of data. If the data is effective-dated, it will display only current and future rows.
Include History 	Displays all rows of data: current, future and history.
Add 	Allow you to add a new record.
Refresh Page 	Reloads the current page to the screen, thereby ensuring that the most current information is displayed.
Go to Page Button 	Displays when there are several pages that are related to the current page. Clicking this button opens a new page with a list of related page links.

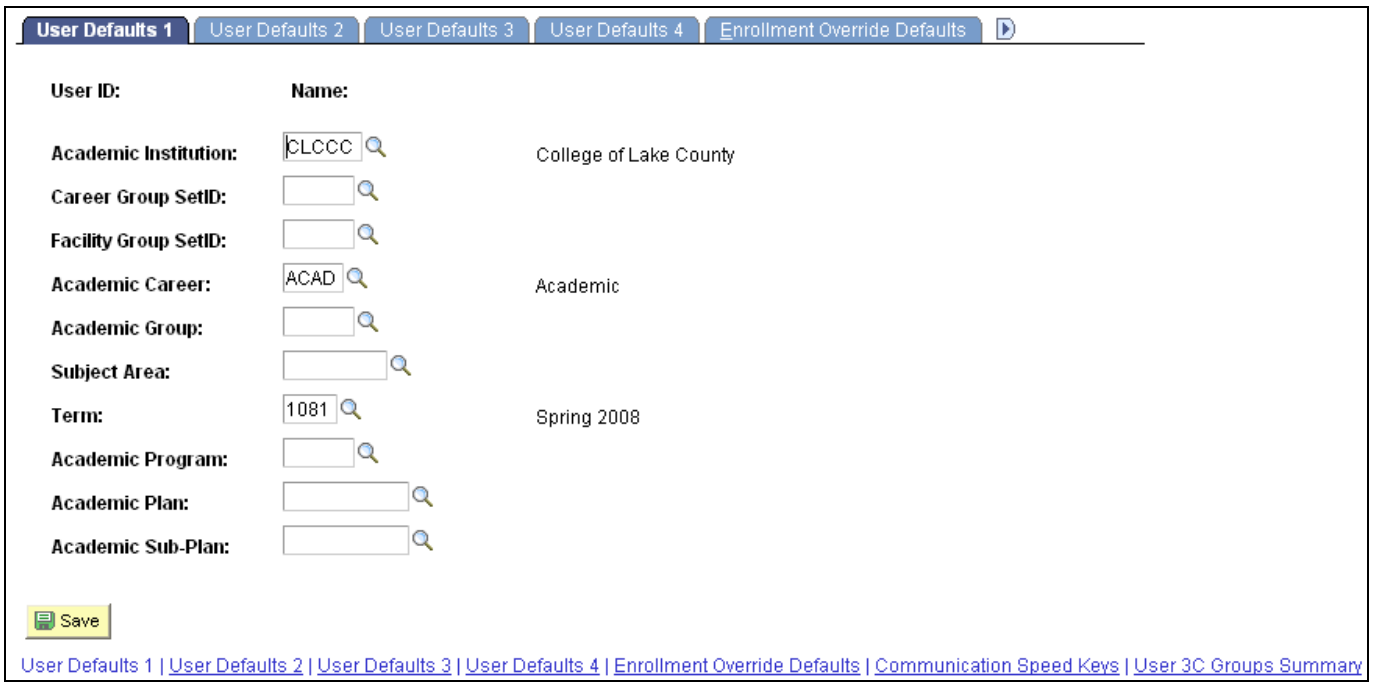
WORKING WITH COMPONENTS AND PAGES

The system is made up of components and pages. Components are the functional areas in the system, and consist of multiple pages. There are hundreds of different components in the system. Some examples of components in the system are:

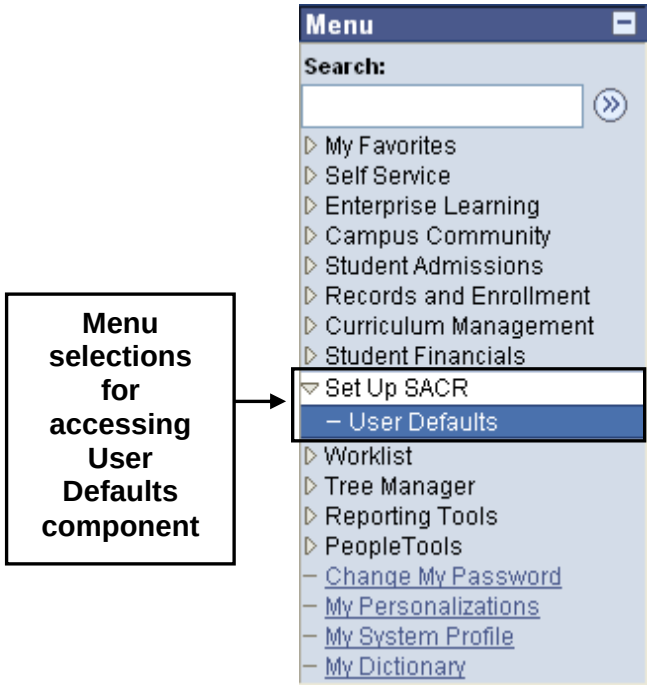
- User Defaults
- Course Catalog
- Student Training History
- Biographical (Student)

You will have access to components based on your security level in the system.

In the screen below, we are looking at the User Defaults component:



Components are accessed from the menu lists. To reach a given component, you will move through a succession of menus and sub-menus. In the example above the menu items chosen were Set Up SACR followed by User Defaults.



(For more information regarding menus, refer to the “Using the Menus” section of this manual.)

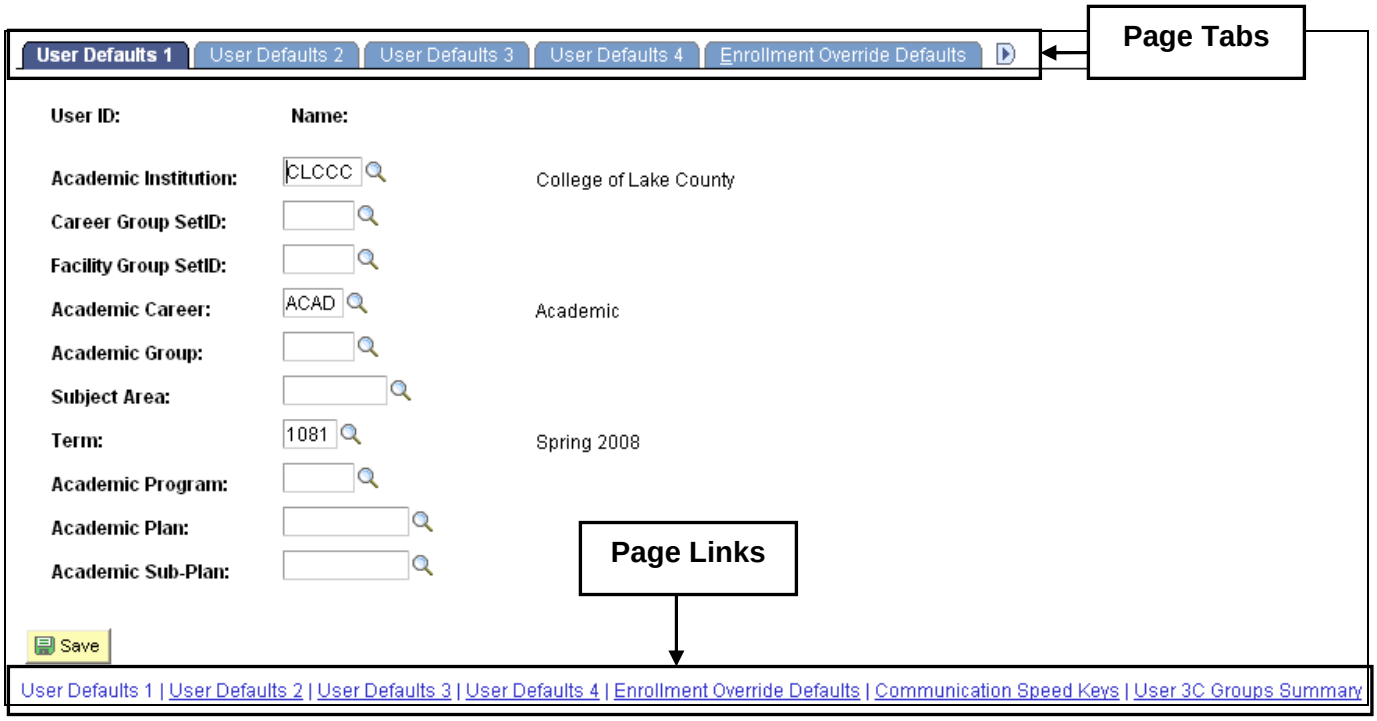
Pages in the system are the individual display screens, and provide a means for performing the following operations in the system:

- viewing,
- updating and
- editing data.

Pages make up the components and are much like pages of a form. You can leaf through the pages in a component, just as you can the pages in a form. Additionally, just as you may need to complete each page of a multi-page form, in many cases, you will need to enter data into all pages of a given component.

MOVING BETWEEN PAGES OF A COMPONENT

The easiest way to move between pages in a component is to click on the page tabs at the top of the page or the page links at the bottom of the page. The screen display below shows the page tabs and links associated with the User Defaults component:

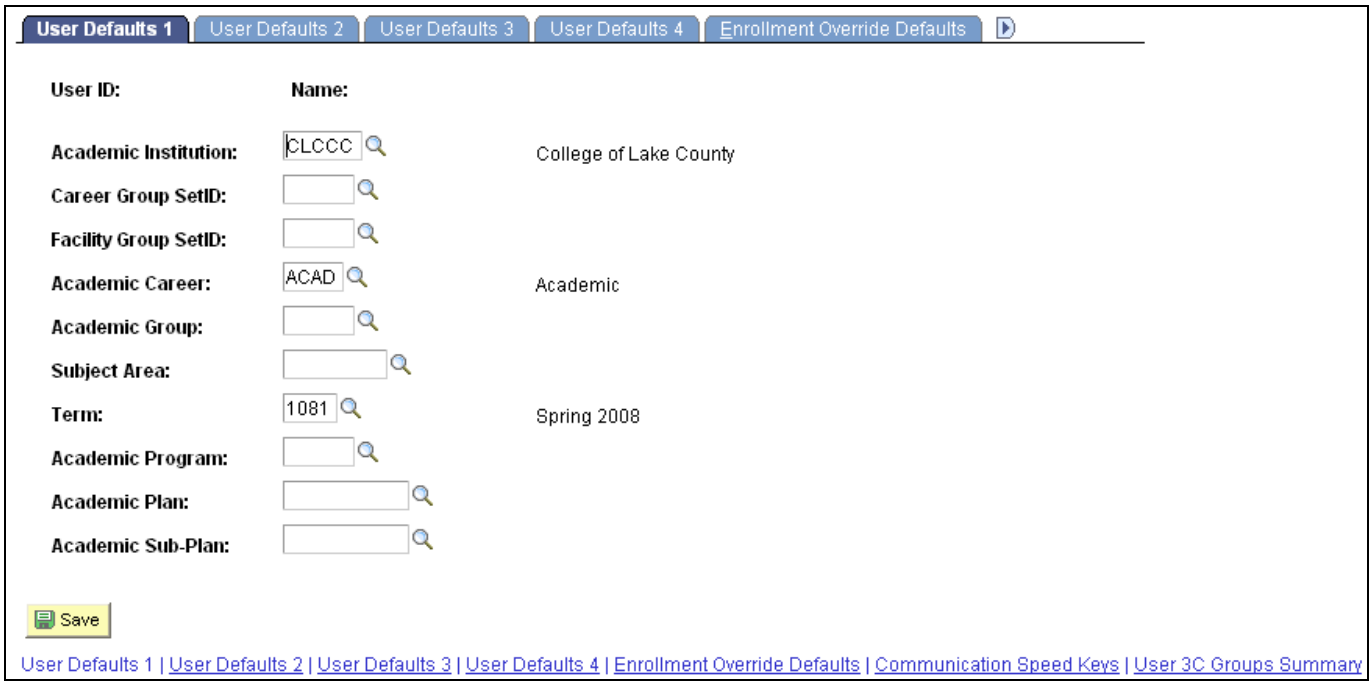


Note All pages in a component have the same search record, so the prompt in the initial search page will be the same, regardless of which page you access first. Additionally, you will not be prompted to enter new search criteria as you move from page to page in the component.

SAVING DATA IN A COMPONENT

Pages in a component are treated as a single entity when you try to save data. When you save data for a page, data stored on all of the pages in the component will be saved.

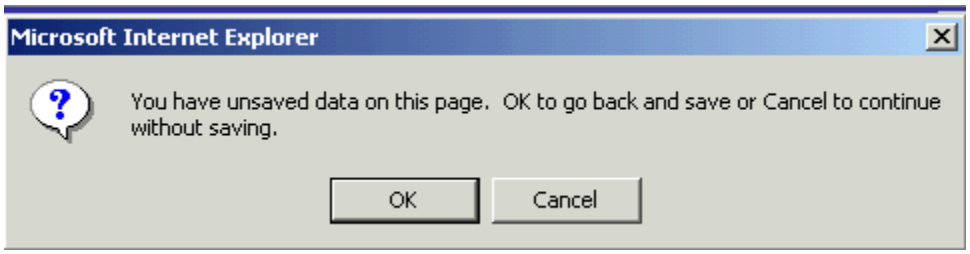
Some of the fields in a page may require you to enter data. These are the required data entry fields. If you have forgotten to enter data that is required, the system will prompt you to enter this data. You will not be able to save a record if you have not entered data into the required data entry fields. Required data entry fields will have an asterisk, *, to the left of their field name.



An error message like the following will appear if you try to save your work and have forgotten to enter data into one or more of the required data entry fields. In the message below, two required data entry fields, fields 15 and 30, have been left blank:

After the error message appears, required data entry fields without data, will have a red background in their edit boxes. In the example below, the user forgot to enter data for the Responsible ID field, which is a required data entry.

The system has some built-in reminders for saving your work. For example, if you attempt to leave a component, by clicking on one of the menu breadcrumbs, without saving you data, you will receive the following message:



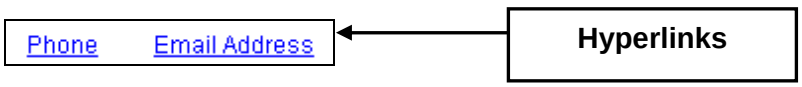
If you do not need to save your data, click the Cancel button on the above screen. Otherwise, click the OK button to return to the data entry screen, and then click the Save button. Most of the time, however, you will not be reminded to save your work. Therefore, try to remember to save your work after you have added or edited any data.

COMPONENTS WITH RELATED LINKS

Occasionally you will encounter pages that, in addition to having links to other pages in the component, have links to related components or pages. You can click on any one of these links to move to the related component, or page, for the record you currently have open. These links allow you to easily move to related components, and to enter or view data, without going through the search process again. There are three kinds of links available:

- **Hyperlinks** – links to other pages in the system
- **Go button**, Go - links to a specific area of a page in the system
- **Drop-down list box with the word "…More"** - contains several more transactional links

Below are examples of links found in pages:



and

When you click a hyperlink, you will notice that the new component contains the same links as the original page, enabling you to return to the original component, if desired. The component, or page, in which you are working will appear in black text and is not underlined.

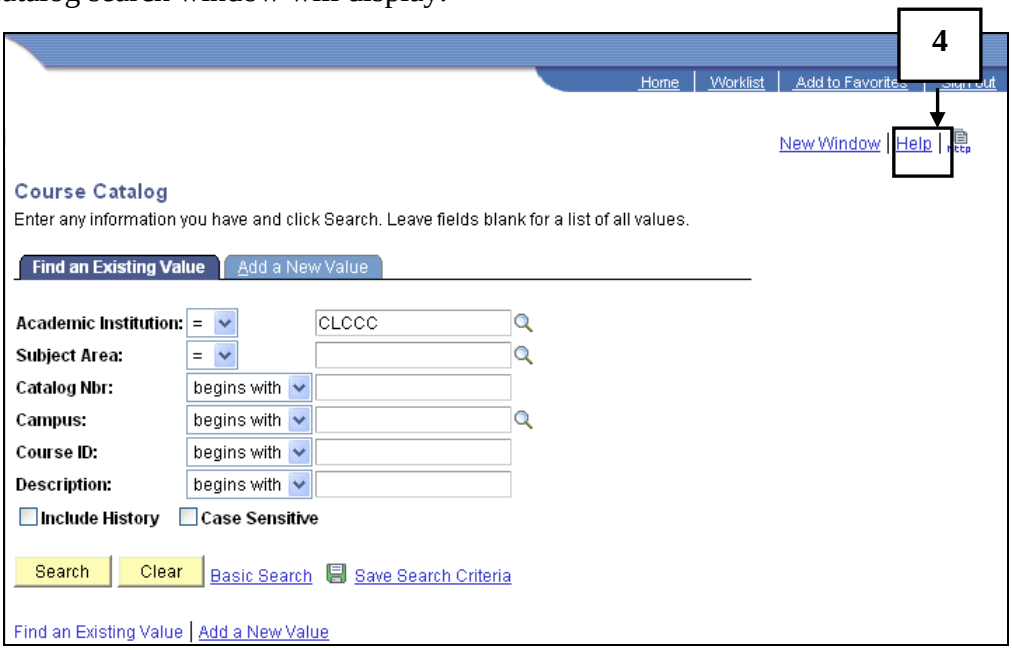
If you click on the "Go" button, Go, it will take to you another component, where you can view and/or enter data into the system.

4. GETTING HELP

Within the PeopleSoft 9.0 application, you can find documentation to help you. To see the Help link, you will need to navigate to a search page.

1. Click on **Curriculum Management** in the Menu pagelet.
2. Click on the **Course Catalog** menu item in the Menu pagelet.
3. Click on the **Course Catalog** link in the Main Menu pagelet.

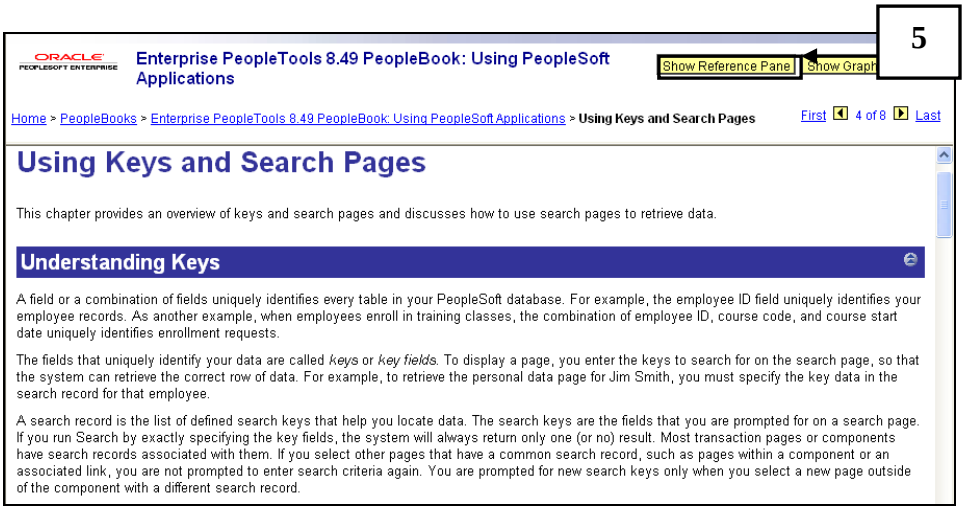
The Course Catalog search window will display.



4. Click on the **Help** link in the upper right corner of the window.

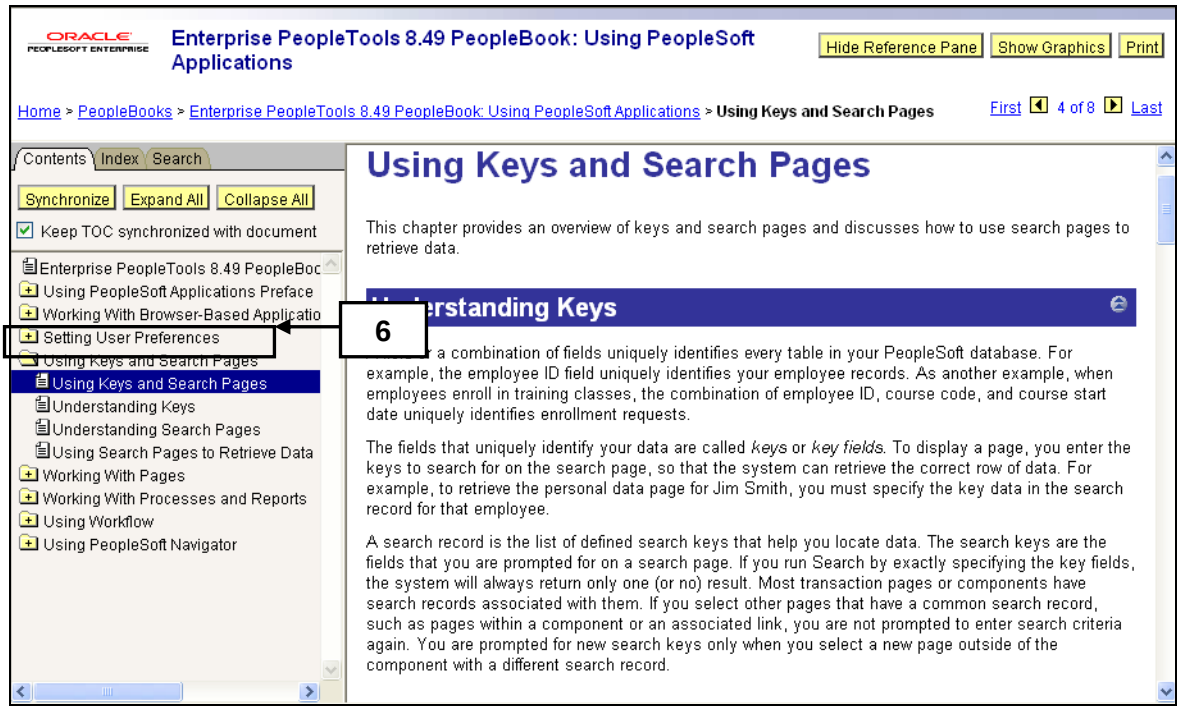
The PeopleSoft help window will display.

5. Click the **Show Reference Pane** button in the upper right corner of the window.



The Reference pane displays. This is a table of contents which can be used to look up specific help topics.

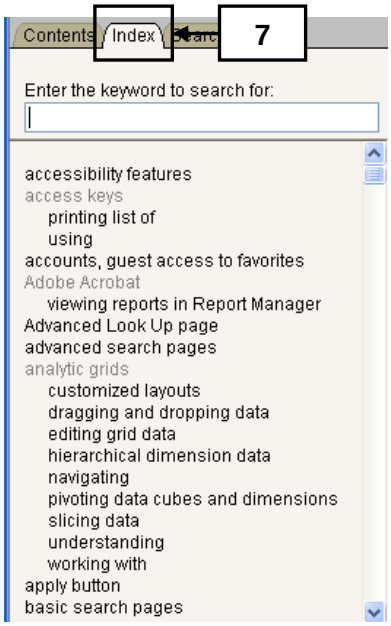
6. Click on **Setting User Preferences**.



The Setting User Preferences folder expands. You could continue drilling down in the table of contents until you can find a topic of interest.

There are two other ways to search for information in the PeopleSoft help system.

7. Click on the **Index tab** at the top of the window.



An alphabetical index of keywords (or topics) appears. You can scroll through the list or simply type a keyword into the Search prompt.

8. Type **Searching** in the keyword prompt.

The window will automatically scroll down to the area of interest.

Note PeopleBooks Help may *not* take you to the exact reference because of the CLC customization of PeopleSoft 9.0.

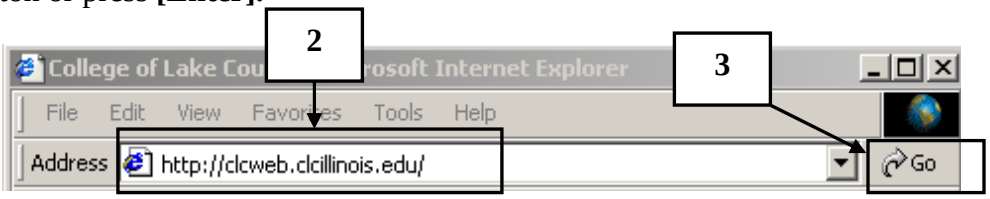
You'll receive the message "No content available" and then be returned to a more general high-level help page instead.

FERPA (FAMILY EDUCATIONAL RIGHTS AND PRIVACY ACT)

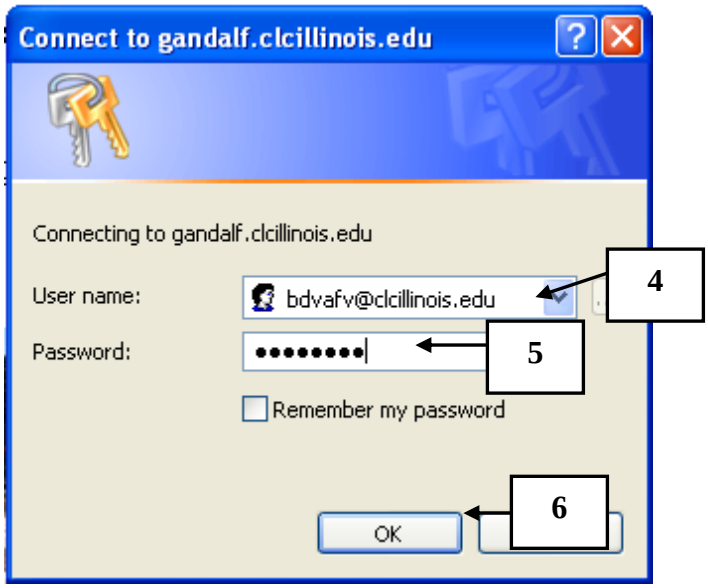
The College of Lake County is legally obligated to protect the privacy of its students in compliance with the Family Education Rights and Privacy Act (FERPA). CLC offers on-line training in FERPA.

To access the on-line FERPA training:

1. Bring up **Internet Explorer**. You can click on the Internet Explorer icon, , in your taskbar.
2. Type **http://clcweb.clcillinos.edu**.
3. Press the **Go** button or press **[Enter].**



4. Type in your **Network User Name** followed by **@clcillinois.edu** and press **[Tab]**.
5. Type in your **Network Password** and press **[Tab]**.
6. Click on the **OK** button or press **[Enter]**.

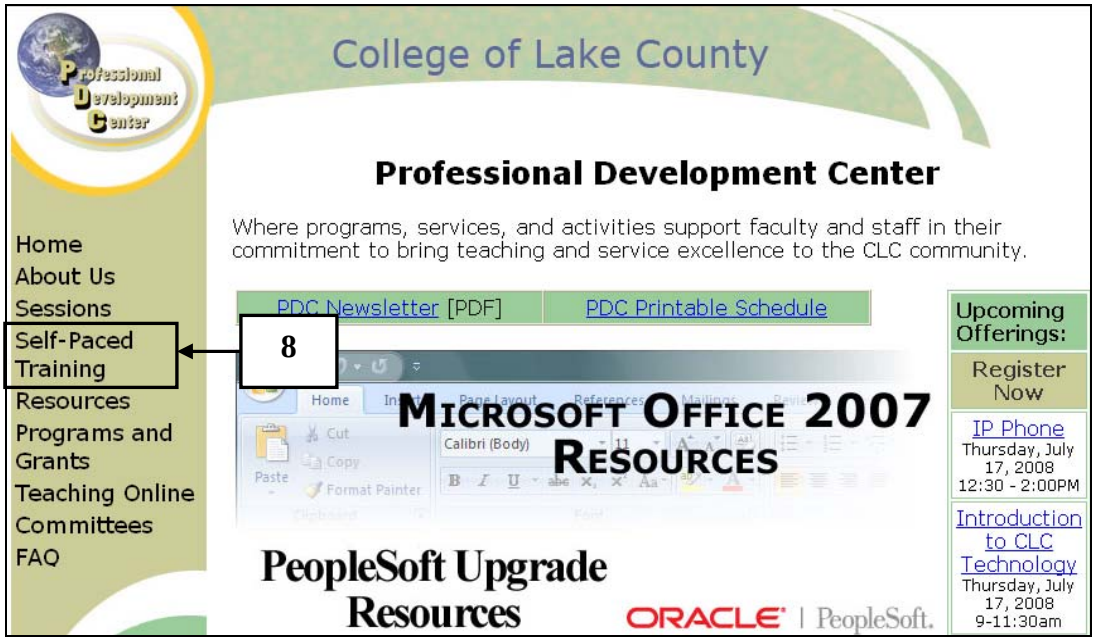


The CLC Intranet page will appear.

7. Click on the **Professional Development Center** link.

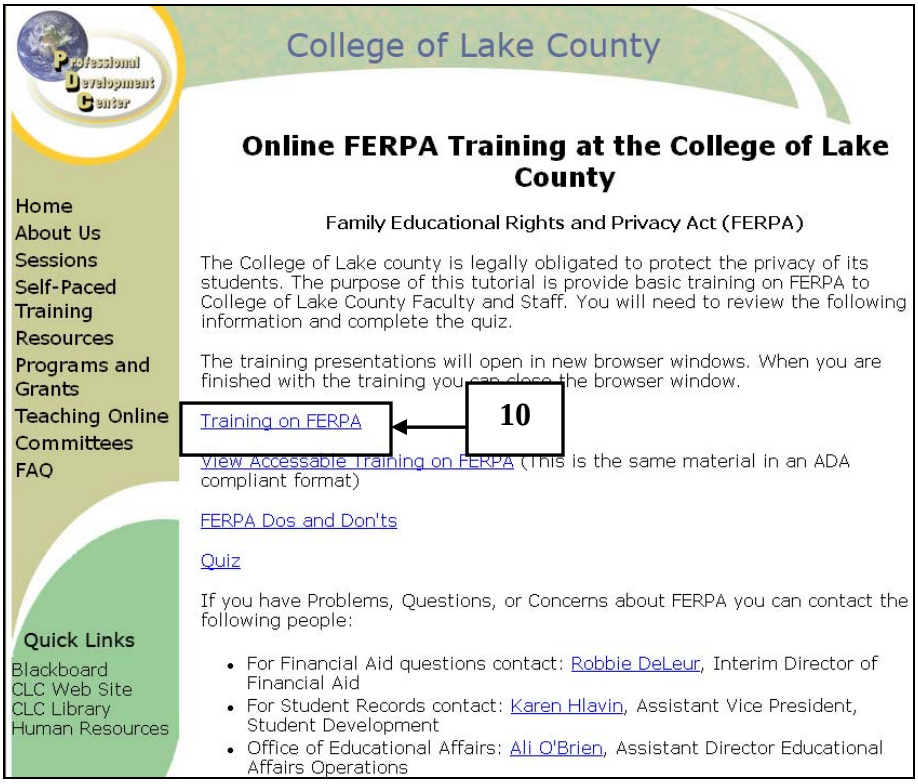
The Professional Development home page will appear.

8. Click on the **Self-Paced Training** link on the left side of the page.



9. Select **FERPA**.

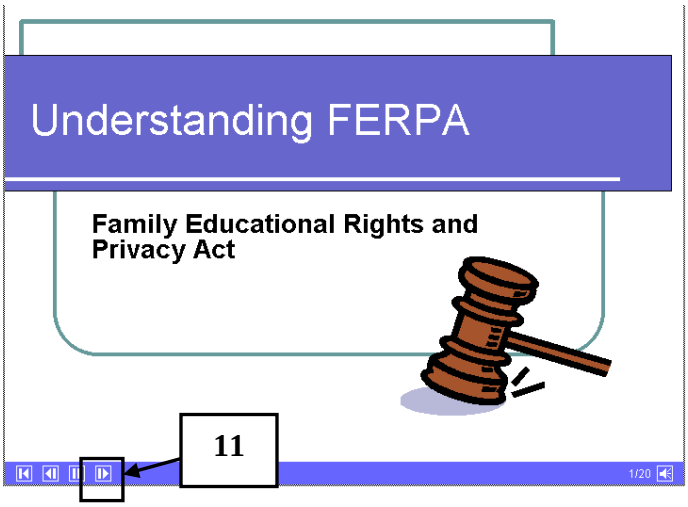
The online FERPA Training page will appear.



10. Click on the **Training on FERPA** link.

The FERPA training program will display.

11. Click on the forward button to advance through the program.



5. OPENING A NEW WINDOW

NEW WINDOW FUNCTION

In the upper right-hand corner of each page in a component, you will notice the New Window link. The New Window function allows you to open a second session in the system. By opening a new window you can keep the current component active (without having to close out of it) and have a second component, or a second session of the same component, open at the same time.

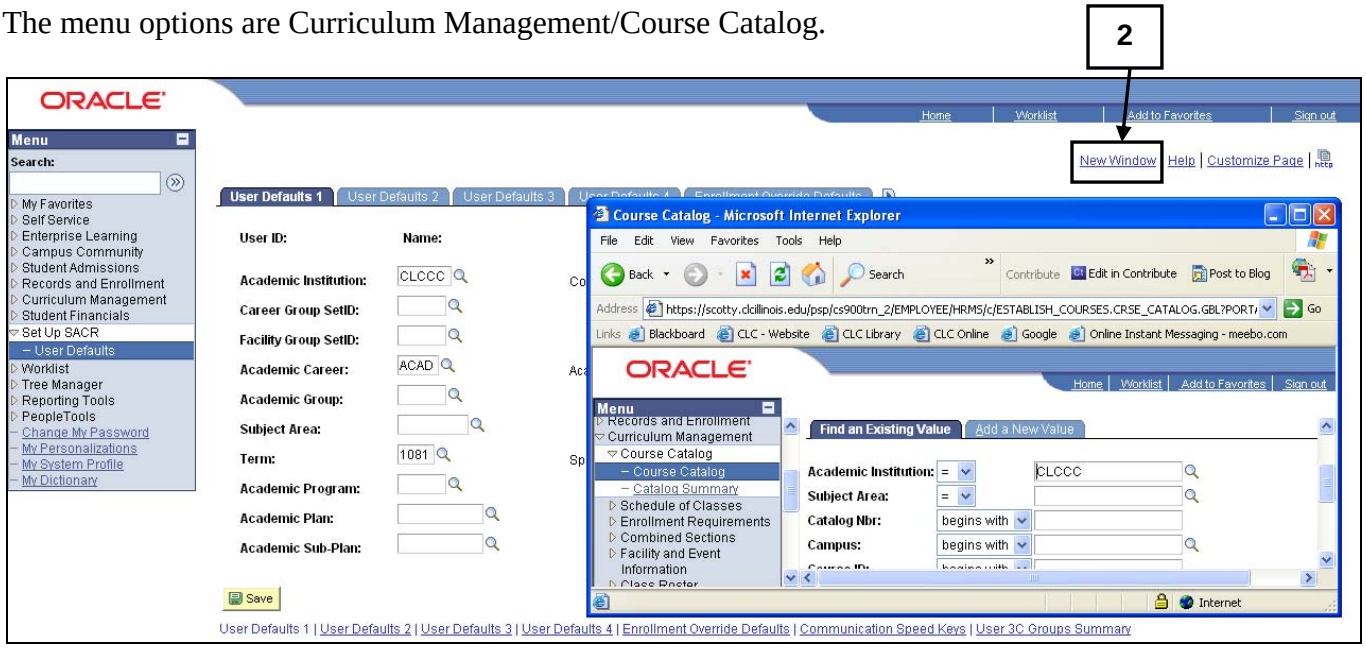
For example, in the screen below, we have both the User Defaults and Course Catalog search windows open at the same time. To open both windows:

1. Access the **User Defaults** component first.

The menu options are Set Up SACR/User Defaults.

2. Click on the **New Window** link, and
3. Access the **Course Catalog search window**.

The menu options are Curriculum Management/Course Catalog.



Now both components are open at the same time. From this point, you can view, or enter data, in each of the open components.

TIPS FOR USING THE NEW WINDOW FUNCTION

Here are some guidelines for using the New Window function:

- **Before opening a new window, save any changes** you have made in the current window. If the session times out while you are working in a new window, you may lose any unsaved changes.
- **Use the New Window function only once** to open up one additional new window. Do not continue opening new windows after you already have two windows open.
- To be on the safe side, **it may be better for you to open another session of your browser**, in order to open more than one component at a time (e.g. open a second session of Internet Explorer and log on, then open the second component you would like to access).
- **Once you have finished using a second component, close this window** using the browser menus, File/Close, or click the close button, , in the upper right-hand corner of the window you would like to exit. This should be done because after 30 minutes of inactivity, in a second open window, your new window session will timeout or expire. This does not invalidate your other, current window, but simply means this expired window is no longer useable. Any unsaved changes in this second window, however, will be lost.

! Warning ! Do not use your browser's menu commands File/New/Window feature. Doing so merely copies the current HTML code from the parent window, rather than opening a new system-maintained window session.

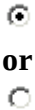
6. IDENTIFYING TYPES OF DATA ENTRY ELEMENTS

On some pages you will see several types of data entry elements. All of the different kinds of data entry elements serve a common purpose – to provide you with a simple way to enter and update data in the system. You can type directly into some data entry elements, such as edit boxes. Other data entry elements, such as radio buttons and drop-down lists, require you to select a value from a list of choices. Understanding how to use each type of data entry element will help you to use the system more effectively.

TYPES OF DATA ENTRY FIELDS

Data entry elements that are associated with specific database fields include the following:

Field Type	Description
Check Box **or**	Small, square box that enables or disables an option. Typically, you select the check box by clicking within it. When you click an empty check box, a check mark appears in the box, , indicating that the option has been enabled. To clear the option, simply re-click in the check box, and the check mark will disappear, , indicating that the option has been disabled. *Note:* Use your spacebar to check and uncheck a check box.
Drop-Down List Box	Rectangular box, similar to an edit box. However, the box will have a down arrow button, , within the box. Clicking the down arrow button will expand the box to display a list of valid values from which you can select a single option. *Note:* Typing the first character, or set of characters, of a value in a drop-down list box, will take you to an item in the list that begins with that character(s).
Edit Box	Rectangular box for entering data. Each field in the system is formatted to accept a maximum number of characters. Therefore, the size of the edit box provides a visual clue about the number of characters that can be entered.
	Some edit boxes have lookup tables associated with them. These edit boxes have a magnifying glass icon, , to the right of them. The magnifying glass indicates that there is a predefined list of valid entries for a given field.
Date Box	Rectangular box with a calendar to the right of it. Click on the calendar icon to view an on-line calendar. Next, click on the proper date to select it.
Long Edit Box	Long rectangular box into which you enter long, free-form text items, such as comments. Clicking on the up and down arrows within the box allows you to view additional lines of text that do not fit in the box.

Field Type	Description
Radio Button  **or**	Small round button that represents one option in a group of mutually exclusive options. Click to select the desired option; only one radio button in the group can be selected at a time. A dot in the middle of a radio button indicates that option is active. *Note:* The spacebar can be used to select and unselect radio buttons.
Search Results Lists Search Results View All First 1 of 1 Last Campus Description / Short Description / Location Code CLC College of Lake County CLC GLC	An area where fields are displayed in a table, with a navigation bar. These fields are read-only, and clicking on any field in a given row will take you to the selected record.

REQUIRED DATA ENTRY FIELDS

An asterisk in front of a data entry field, *, indicates that the field is a required data entry field. Below is an example of a required data entry field:

The asterisk to the left of the field name indicates that you must enter data into the field if you want to save the data in that component. Whenever, you attempt to save a record, where you have failed to enter data into one or more required data entry fields, a message will appear:

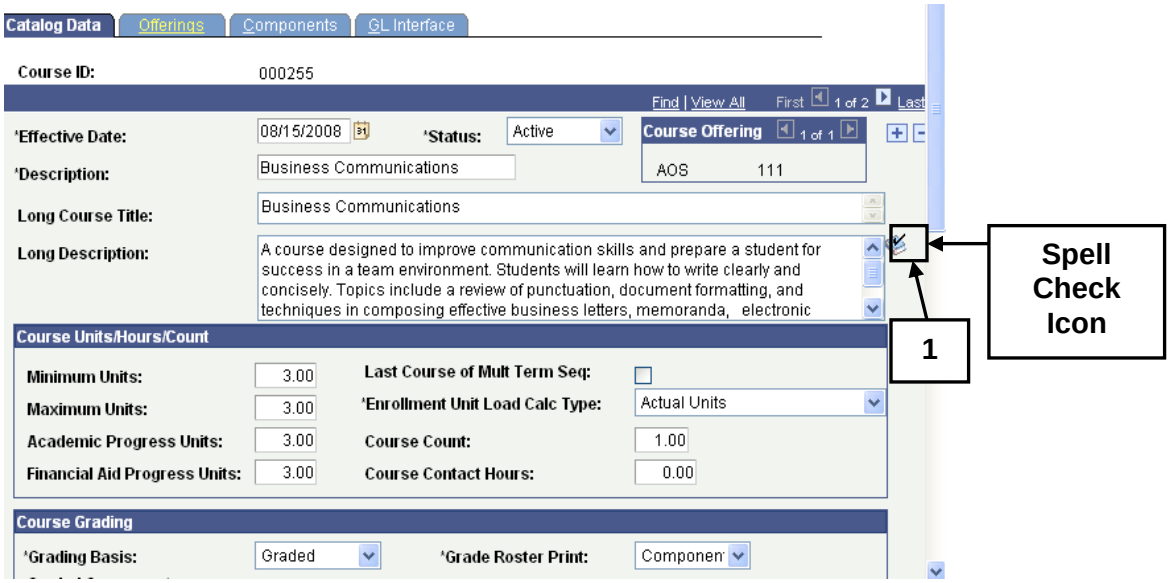
In the message above, we can see that two different fields, fields 15 and field 30, are required data entry fields. When this message appears, click OK. You will return to the original data entry screen. Required data entry fields not completed will appear with a red background fill in the edit box:

You must then enter data into all of the required data entry fields in order to save the record.

7. NEWER FEATURES

USING SPELL CHECKING

A course will display and the Catalog Data tab will be active. You will see a new icon for spell checking, . It can be found on the right side of some fields. For example, the Spell Check icon is available for the Long Description field in the Course Catalog component.



1. Click on the **Spell Check** icon to the right of the Long Description field.

The following window will appear, since there are no spelling errors. If there had been errors, you would have had the opportunity to change these errors. This is a very handy tool when you are entering or editing data in PeopleSoft.

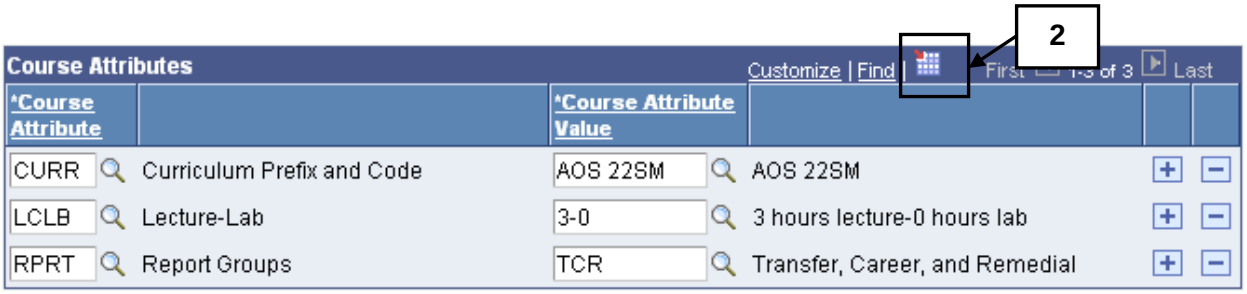
2. Click **OK**.

USING THE DOWNLOAD TO EXCEL FUNCTION

There is a new function in PeopleSoft 9.0 that allows you to download data from PeopleSoft into another program, such as Excel.

1. Scroll down in the Course Catalog window to the **Course Attributes** area.

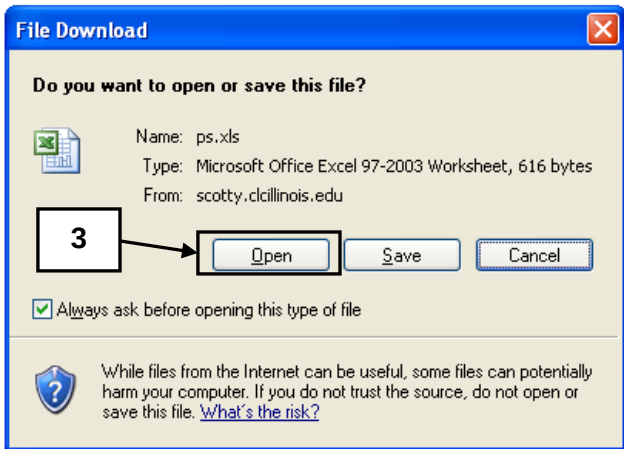
In the Course Attributes title bar, you will see the download icon, . This function is available for some groups in PeopleSoft. For example, the download icon is available for both Course Attributes and Course Topics in the Course Catalog component of PeopleSoft 9.0.



2. Hold down your **Ctrl** key and then press the **download** icon.

Note If the download function does not work, you will need to turn it on using the My Personalizations link in the main menu. Refer to pages 7-1 and 7-2 for help with this.

The File Download window displays as seen below.



3. Click the **Open** button.

The Security Alert window may display.

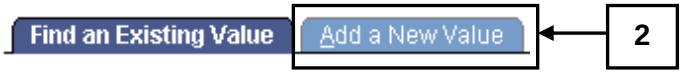
4. Click the **Yes** button.

USING GRID TABS

Grid Tabs are located at the top of a search screen. The shaded (or darker) tab is always the active one. By default the "Find an Existing Value" tab will be active.

1. Return to the **Course Catalog search screen**.

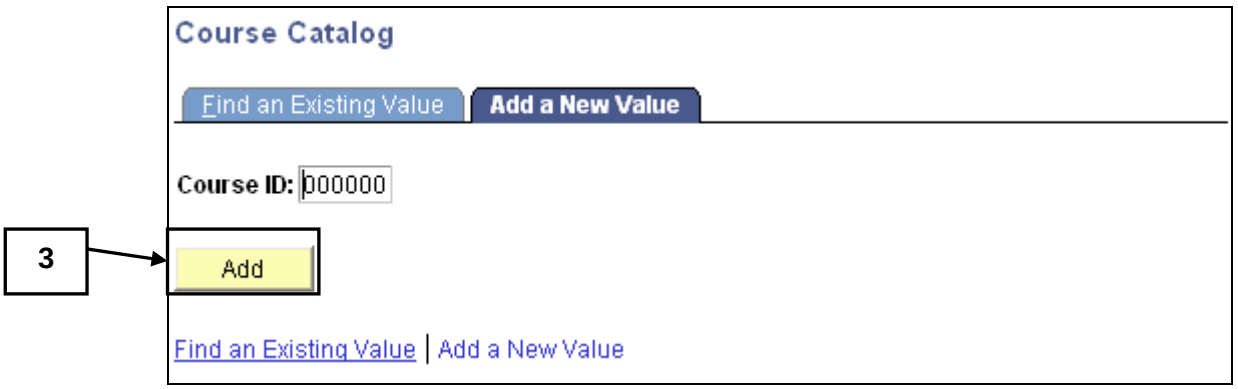
You will see two tabs at the top of the window as seen below.



2. Click on the **Add a New Value** tab.

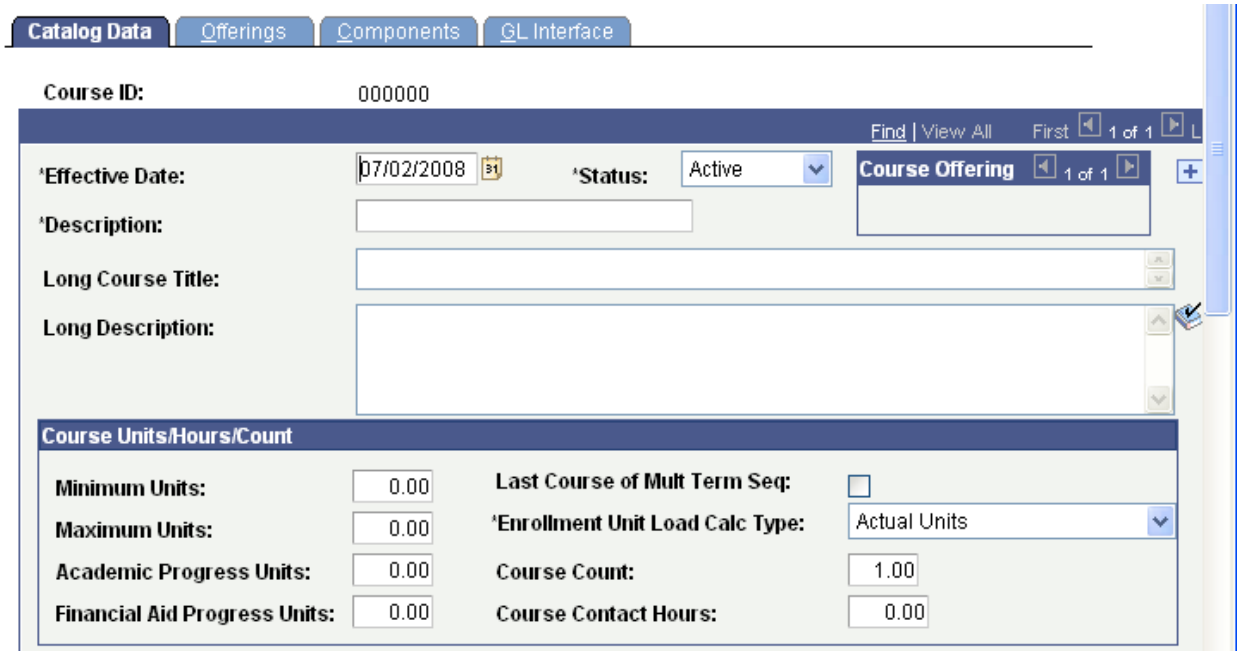
A new screen will appear.

3. Click the **Add** button.



The Course Catalog data entry screen will appear. If you wanted to add a new course to the catalog, you would fill in the necessary prompts and then click the Save button, Save, at the bottom of the page to save your work.

Note: You would want to run Spell Checker on any new fields having this feature.

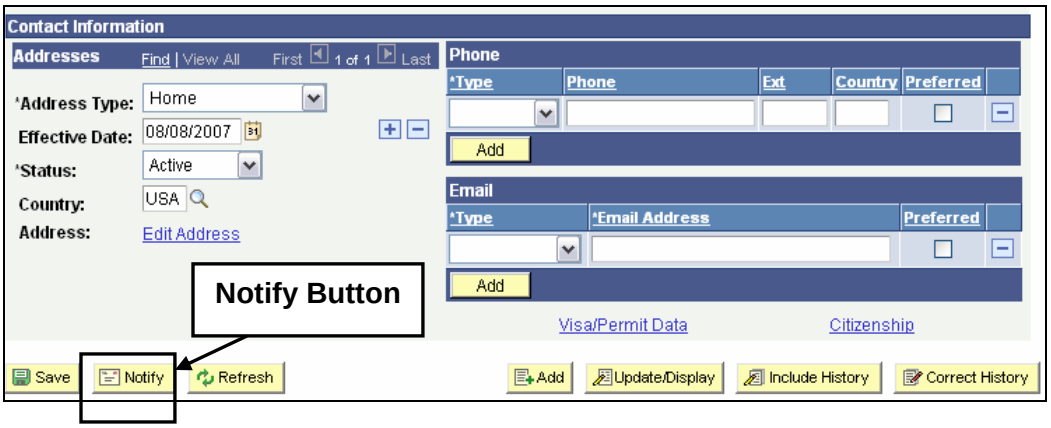


Note You would want to run Spell Check on any new fields in which you've entered data that have .

USING NOTIFY BUTTON

The Notify button appears on many pages throughout PeopleSoft 9. It takes you directly to an e-mail page, thus making it easier to communicate with staff, faculty, or a student about any action just performed on that PeopleSoft page.

For example, if you've changed a student's primary e-mail address (per their request), you can then confirm the change in the e-mail by using the Notify button at the bottom of the Contact Information page. There isn't any need to transfer to CLC's e-mail system to accomplish this notification.



Note PeopleSoft 9,0's e-mail function is intended for use when communicating specifically about PeopleSoft–related information / actions. Otherwise, continue to use CLC's e-mail system.

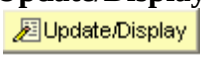
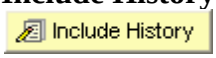
8. USING PAGE ACTIONS TO VIEW DATA

PAGE ACTION BUTTONS

The system comes with a number of page actions buttons, which are located at the bottom right-hand corner of some pages. Depending on the function you trying to execute in the system, all, some combination, or none of the page action buttons will appear. These page action buttons appear when you:

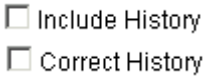
- retrieve rows in a table,
- modify rows in a table, or
- insert rows in a table.

Pressing any one of the buttons serves to apply specific rules to the data, based on the effective date. The button selected will dictate whether you can access certain fields, and what you can do with each type of row. The table below provides information on each of the page action buttons.

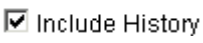
Page Action Button	Views Available	Changes	Insert New Rows
Update/Display 	Current and Future	Future only. Will not include a historical record for the data.	Can use this option when the effective-date is greater than or equal to the current row.
Include History 	History, Current and Future	Future only. Will create a history for the record.	Can use this option when the effective-date is greater than or equal to the current row.
Correction	History, Current, Future	All existing rows. Will update the historical record to reflect changes.	When using this option, there will be no effective-date restrictions. **Note:** Access to this function is security dependent.

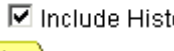
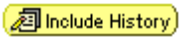
You can toggle between page action buttons by clicking on them, or by using the [Alt]+\ key combination on your keyboard, and then by pressing [Enter] to activate the selected button.

Sometimes, these page actions will appear as check boxes on a search page rather than as buttons. Here are examples of check box page action options:



When these check boxes are present in a search page, you can simply click in the check box to select one of these options. A checkmark will appear, if the option has been selected, as in:



Activating one of these check boxes in a search page is exactly the same as clicking on the corresponding page action button at the bottom of a component page. For example, activating the Include History checkbox,  , in a search page is the same as clicking on the Include History button,  , at the bottom of a component page.

EFFECTIVE DATES

The use of effective-dates in the system allows for:

- storage of historical data,
- viewing of changes in data over time and
- entry of future data.

For example, you may want to track several events in the career of a student, such as:

- the date they applied for admission,
- when they were accepted, and
- when they graduated.

When any data is added to the system, an historical record for each entry is maintained in the system. This provides an audit trail for all additions and changes in the system.

When editing is done to records in the system, the original data is retained in the system. The new data is added to the system along with an effective date (when the information will go into effect). In this manner changes made to a record can be tracked over time.

Effective-dated rows are categorized into the following basic types:

Types of Effective-Dating	Description
Current	The data row with the date closest to, but not greater than, the system date. **Note:** Only one row can be the current row.
History	Data rows that have effective dates earlier than the current data row.
Future	Data rows that have effective dates later than the system date.

9. USING THE SEARCH FUNCTION

Once you have selected the menu items required to move to the desired area of the system, a search page will display. You must use search pages in order to locate system data. Therefore, you must understand how to use the various search functions in the system.

USING SEARCH CRITERIA

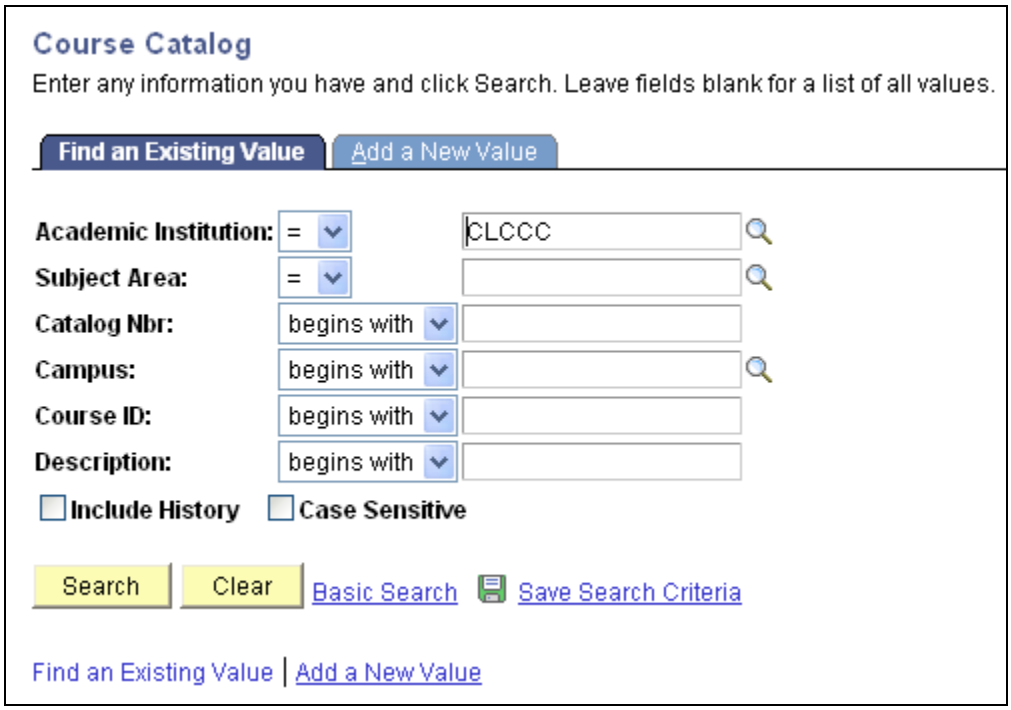
Searches can be conducted on a single or multiple database fields. If you would like to use a single field for your search, you will use a basic search page. If, on the other hand, you would like to use some combination of fields for your search, you will use an advanced search page.

Each component has a search record, which is a list of defined search fields that can be used to help you locate data in a given component. We will access the following menus to move to the Course Catalog component:

- Curriculum Management
- Course Catalog

In the basic search page below for courses, only one field in the search record is required, Academic Institution. The other fields, Subject Area, Catalog Nbr, Campus, Course ID, and Description are optional.

BASIC SEARCH PAGE

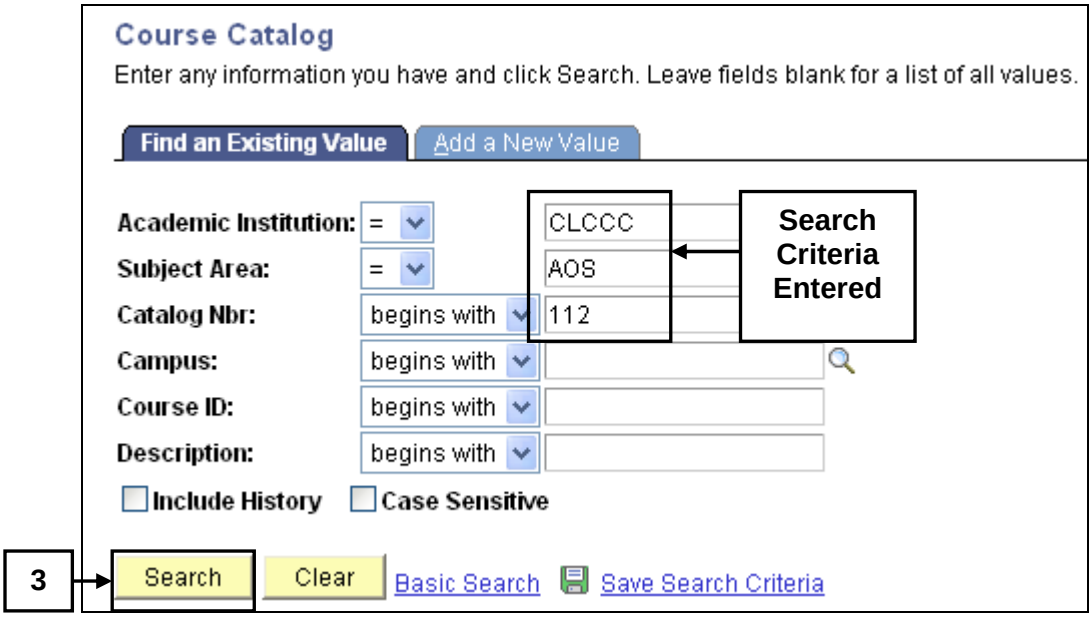


This search will locate all courses offered at the College of Lake County.

To conduct a more detailed search, you could add the Subject Area to the Search page or any combination of fields in the search record.

To conduct a search:

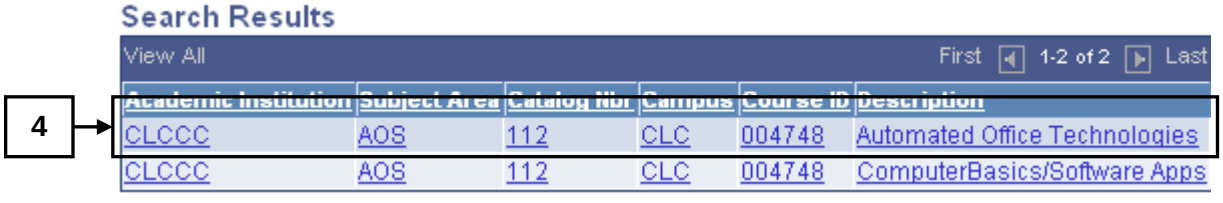
1. Using the menus, **move to the component for which you would like to conduct your search**.
2. **Enter a full, or partial, value for the search field(s) you would like to base your search upon.**
3. **Press the search button**, or press **[Enter]**.



The system automatically begins searching the database for entries meeting the criteria, and will provide you with a list of possible matches; or, if there is only a single match, the page you requested.

In the example above, we want to look up all Automated Office Technologies (AOS 112 classes) offered at CLC.

When the search results display**,** there will be an indicator of the number of results meeting your criteria. In the example below, we have located 2 courses meeting our criteria.



4. To see additional information on the first class, simply click on any one of the hyperlinks (CLCCC, AOS, 112, CLC, 004748, or Automated Office Technologies) in the first row.

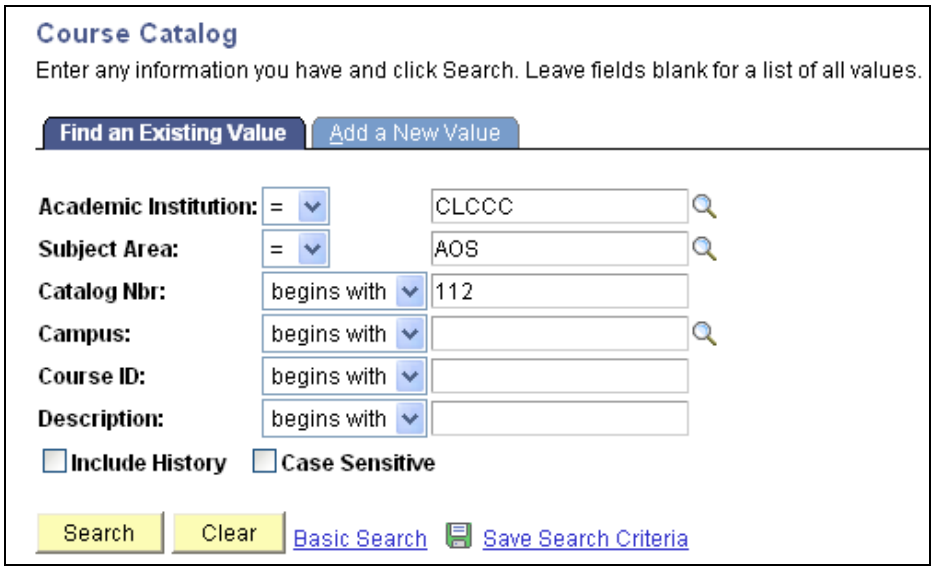
SEARCHES USING FIELD-LEVEL PROMPTS AND VALIDATION

Some fields in search pages are linked to lookup tables in the system. These lookup tables contain a list of valid entries for a given field. For example, if we want to look up courses based on the Subject Area field, there are only a limited number of subject areas. As such, they are stored in a lookup table. Lookup tables are necessary, then, to ensure, that data stored within the system is valid.

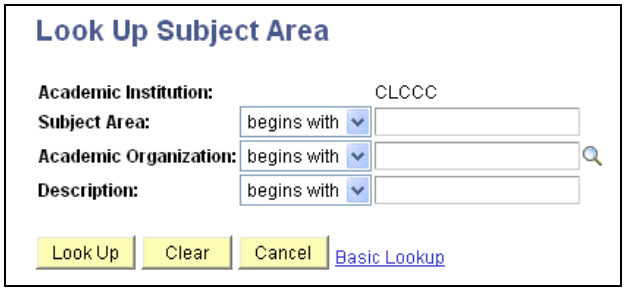
In a search page, fields with associated lookup tables will have a magnifying glass, , to the right of the associated edit box. For example, in the screen below the display fields, Academic Institution, Subject Area, and Campus, all have lookup tables associated with them.

To conduct a search using fields having associated lookup tables:

1. Using the menus, **move to the component for which you would like to conduct your search.**
2. Click on the **magnifying glass to the right of the field(s) on which you would like to conduct your search.**



Clicking on the magnifying glass, , to the right of any of edit boxes (or by pressing [Alt]+5 while in an edit box with an associated lookup table), will produce a lookup screen. For example, if we click on the magnifying glass to the right of Subject Area, the following screen will appear:



In addition to the Look Up Subject Area at the top of the screen, we have a list of the first 300 subject areas in the system. A list of valid entries for the field will appear. In this case we can see a partial list of the terms located in the system. This screen shot below represents only the first 24 entries in the search list.

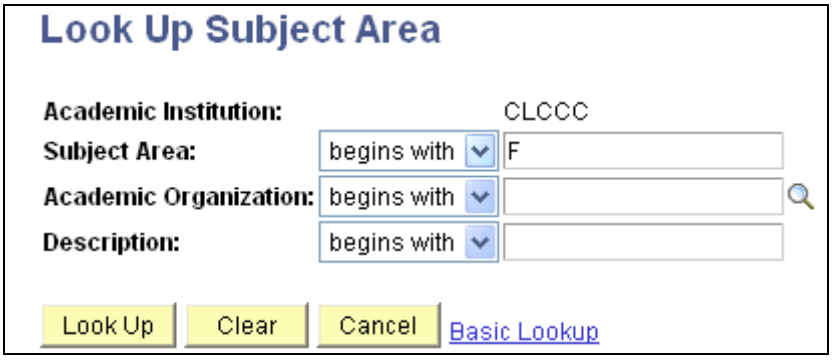
Search Results

Only the first 300 results can be displayed. Enter more information above a

View All First 1-100 of 300 Last

Subject Area	Academic Organization	Description
ABE	ACEDV	ABE - Adult Basic Education
ABR	EGRDV	ABR - Automotive Collision Rep
ACC	BUSDV	ACC - Accounting
ACR	EGRDV	Air Condition & Refrigeration
ADE	ACEDV	ADE - Adult Education
ADET	ACEDV	ADET - Adult Education Trainin
AEPD	ACEDV	Adult Ed. Prof. Development
AGR	BIODV	Agriculture
AIB	BUSDV	Finance & Credit
ANT	SOCDV	ANT - Anthropology
AOS	BUSDV	AOS - Administrative Office Sy
ARA	COMDV	ARA - Arabic
ARC	EGRDV	ARC - Architectural Technology
ART	COMDV	ART - Art
AST	EGRDV	AST - Astronomy
AUT	EGRDV	AUT - Automotive Technology
BCT	EGRDV	BCT - Building Construction Te
BIO	BIODV	BIO - Biology
BSS	BUSDV	BSS - Administrative Office Sy
BUS	BUSDV	BUS - Business Administration
CAD	EGRDV	CAD - Computer Aided Design
CALH	ACEDV	Continuing-Allied Health
CAVO	EDAFF	CAVO - Avocations
CBA	ACEDV	Basset

We will narrow down the search by specifying a subject area that begins with the letter “F” as seen below.



Look Up Subject Area

Academic Institution: CLCCC

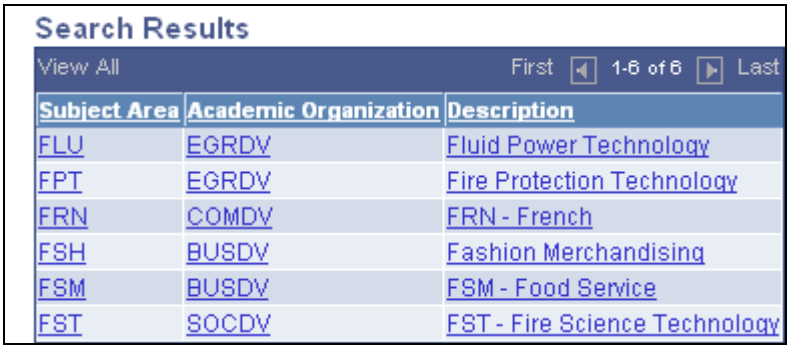
Subject Area: begins with F

Academic Organization: begins with

Description: begins with

Look Up Clear Cancel Basic Lookup

The search results have now been narrowed down to a list of six entries.

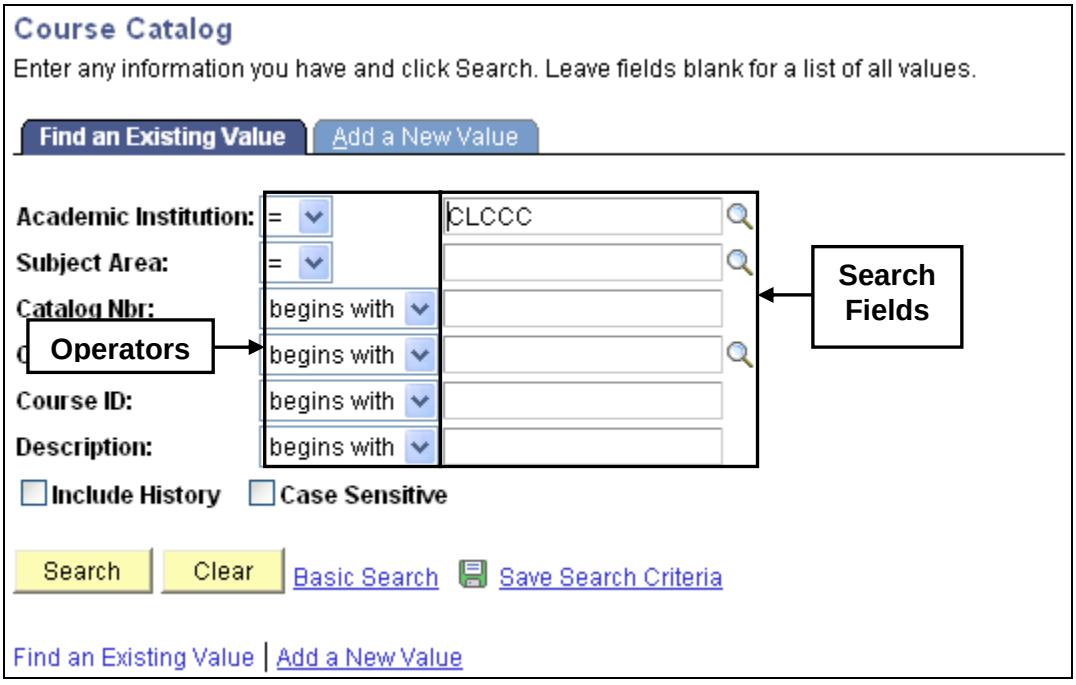


3. Click on any of the **hyperlinks in the row of the value you would like to use for your search.**

Tip If you know the value to be used for a specific field with an associated lookup table, you may type it directly into the edit box. However, you must enter a valid entry. For example, in the previous search, we could type in a value of "FSM" for Subject Area to search for Food Service courses.

USING SEARCH OPERATORS

To navigate to any of the components in PeopleSoft 9.0 you must first conduct a search. Each search screen includes a list of search fields along with a list of operators. In the Course Catalog search screen below, you will see six search fields as well as specific operators associated with the fields.



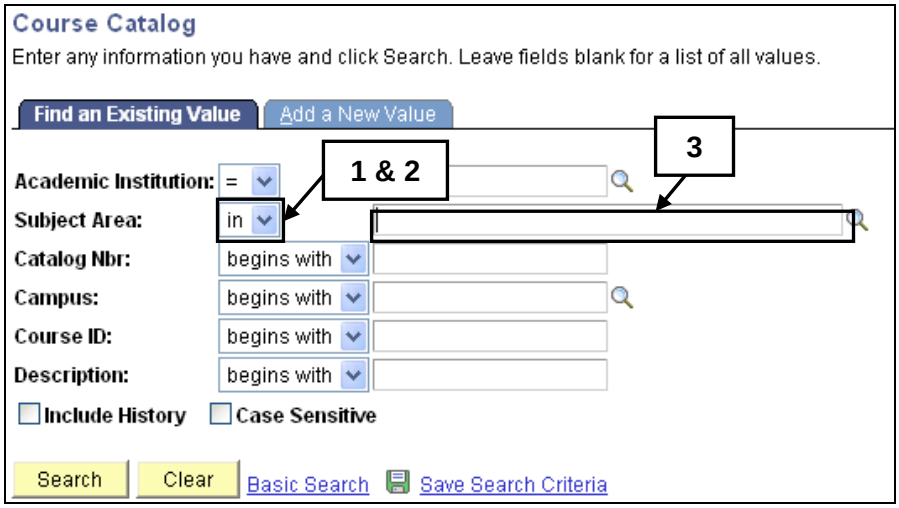
The default operator will display for each field. You can change the operator by simply clicking the down arrow to the right, , and selecting a different option. For example, clicking the down arrow to the right of the equal sign (=) brings up a set of two options, = or in; or clicking the down arrow to the right of "begins with" brings up a list of ten options.

The table below includes a list of operators along with descriptions and examples of each.

Operator	Description	Example
in	Allows you to enter two or more values for a field. The values must be comma-delimited.	in CIT,AOS, would locate all course with a subject area or CIT or AOS
begins with	Allows you to enter the first one, two, three, etc. values for a field.	begins with 12, would locate all values beginning with the numbers 1 and 2 in succession
contains	Allows you to enter any part of a field.	contains a, would locate any values having the letter "a" anywhere in the value
=	Must enter an exact match for a field.	=CIT
not=	Allows you to enter a value to be eliminated from the list of possible values	Not= CIT
<	The less than operator should be used on fields containing numbers and will return values less than the specified value.	< 345
<=	The less than or equal to operator should be used on fields containing numbers and will return values lower than or equal to the specific value.	<= 655
>	The greater than operator should be used on fields containing numbers and will return values greater than the specified value.	>543
>=	The greater than or equal to operator should be used on fields containing numbers and will return values higher than or equal ot the specified value.	>=321
between	The between operator should be used on fields containing numbers and will allow you to specify a starting number and ending number. The result will include both numbers specified along with any betweent he specified values.	Between 36 and 45, would locate all values equal to 36 and 45 as well as all values in between.

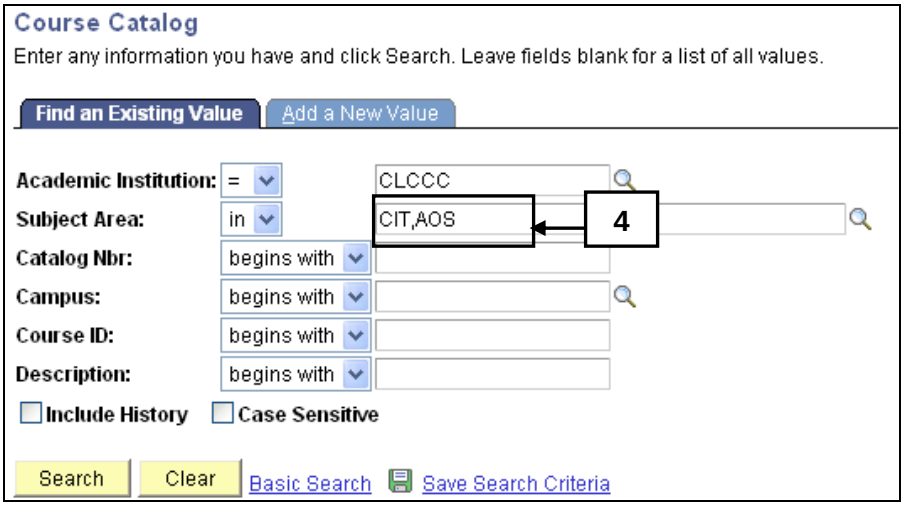
The Academic Institution prompt defaults to CLCCC, which is the only valid entry for this field.

1. Click on the **down arrow**, , to the right of the Subject Area: prompt.
2. Select **in**.



The “in” operator allows you to select a list of valid values rather than a single value.

3. Click in the **Subject Area: prompt**.
4. Type: **CIT,AOS**.



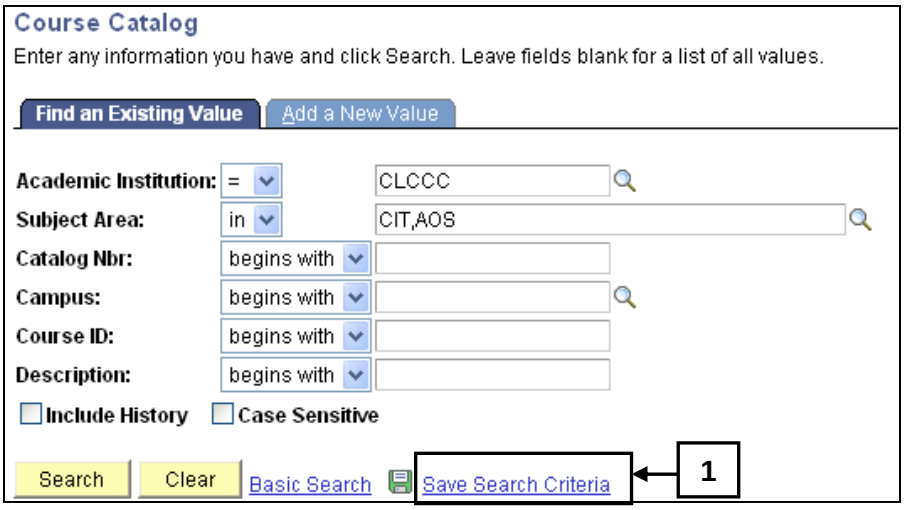
Using the “in” operator, you can conduct searches involving more than one value for a field. In this case we are searching for all Conputer Information Technology and Administrative Office Systems classes. When using the “in” operator, you must use only valid entries for the field and must deliminate the values with commas.

Note Defaults, like CLCCC, are set by the user in User Defaults. If not set, the user has more repetitive input to do each day. (See Setting User Defaults section of this manual for more information on setting user defaults.)

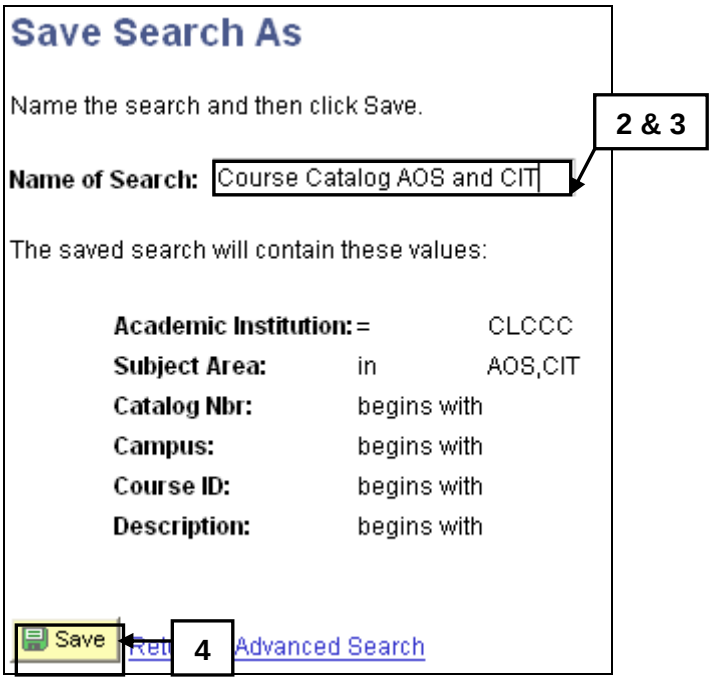
SAVING SEARCH CRITERIA

Once you have conducted a search, you may want to save it for future use.

1. Click the **Save Search Criteria** hyperlink.

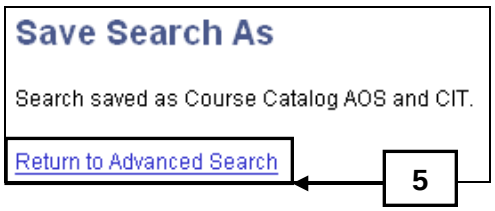


The Save Search As window appears as seen below.



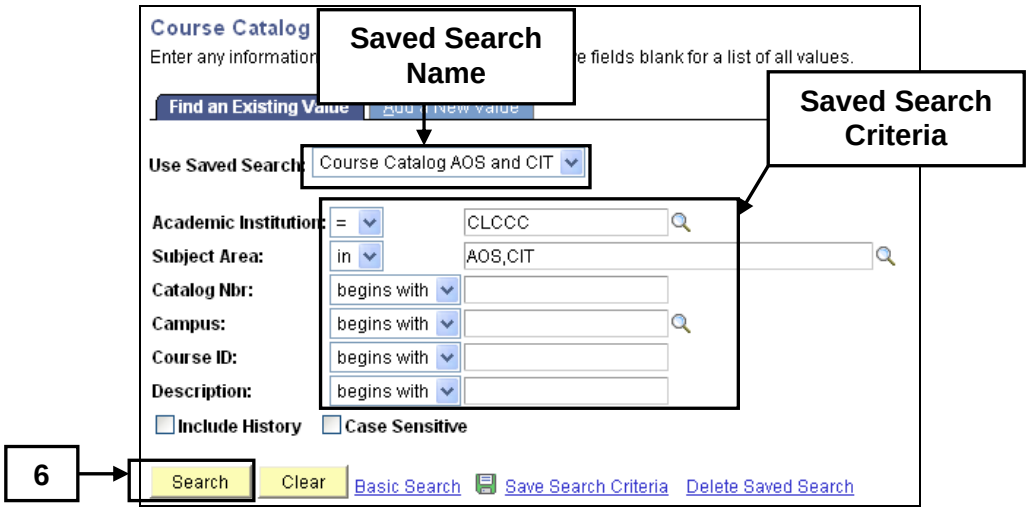
2. Click in the **Name of Search: pro**mpt.
3. Type **Course Catalog AOS and CIT**.
4. Click the **Save** button.

The Save Search As window display.



5. Click the **Return to Advanced Search** hyperlink.

At the top of the Course Catalog window will be a Use Save Search: prompt. Your saved search, Course Catalog AOS and CIT, will be in the prompt whenever you enter the Course Catalog component.



6. To run the search, press **Enter** or click the **Search** button.

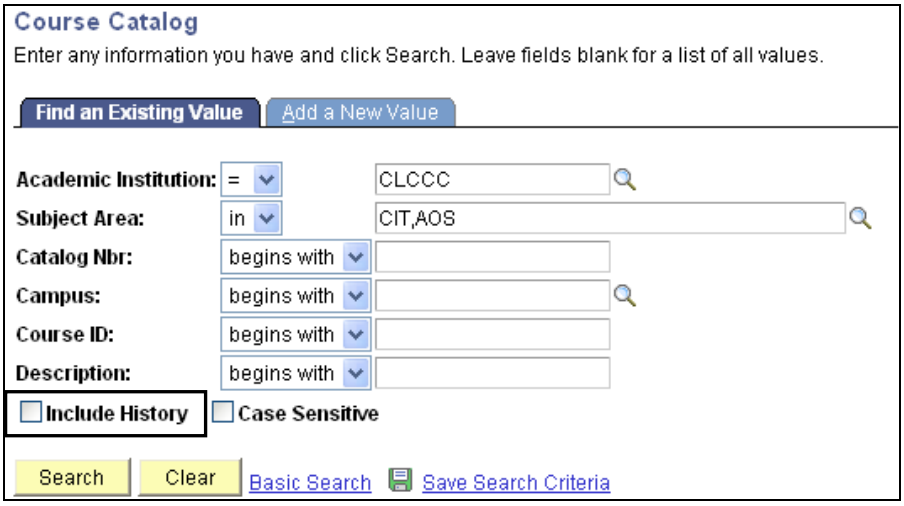
A search result list will display, as seen below.

7. Click on **any of the links in the first row** in the Search Results.

The course will now display.

INCLUDE HISTORY AND CORRECT HISTORY FUNCTIONS

Many of the search pages contain the Include History check box, as in the screen below:



This check box is available for effective-dated records. You may see a Correct History checkbox in some search screens as well. You can select one of these options, (they are mutually exclusive) for a search, or leave them blank.

If you check both the Include History and Correct History checkboxes, the default setting will be Include History. A description of each of these options follows:

Search Page Options	Function
Include History ☐ Include History	Brings up the record up along with all of the corresponding effective-dated rows: Past, Current and Future.
Correct History ☐ Correct History	Brings up the record up along with all of the corresponding effective-dated rows: Past, Current and Future.

Note To make changes to existing, effective dated rows, you must use correction mode. Keep in mind that correction access is security driven in the system, and, therefore, most users will not have this capability.

SEARCH PAGE BUTTONS

Below is a table of buttons appearing on search pages along with a description of each:

Button	Function
Search Button Search	Processes the search once you have entered search criteria into the search fields. **Note:** You can execute a search by pressing your [Enter] key as well.
Clear Button Clear	Clears entered text from all of the edit boxes on the search page (without saving), so that you can reenter your search criteria.

SEARCH RESULTS

Whenever you execute a search, you can expect one of two possible outcomes:

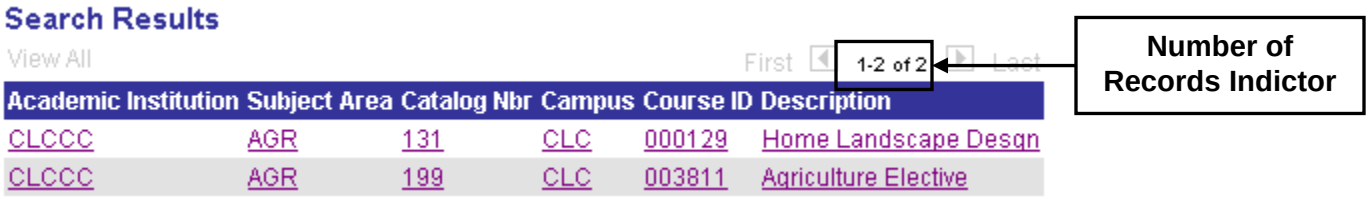
1. **Go directly to the desired search record** – search criterion exactly matches a single record.
2. **Displays a search results list** - search criterion matches more than one record. To access any record in the search results list, click any of the hyperlinks for that record.

When your search criterion matches more than one record, you will return one of three search results.

- **Single Column Search Result List** - for smaller search results lists, you will return a list containing a single column of records. At the top of the list will be an indicator of the number of records in the list.
- **Subdivided Search Result List** - for larger search results lists, you will return multiple columns of records. At the top of the first list will be an indicator of how many total records are contained in the lists, and how they are subdivided.
- **List With Message to Narrow Search** - if the records matching your search criterion exceed 300, you will see a message at the top of the window indicating that you should further refine your search to limit the number of records returned.

SINGLE COLUMN SEARCH RESULT LIST

A single column search result list will appear, if the number of records returned is relatively small. In the example below we can see that the search results list contains 2 entries.

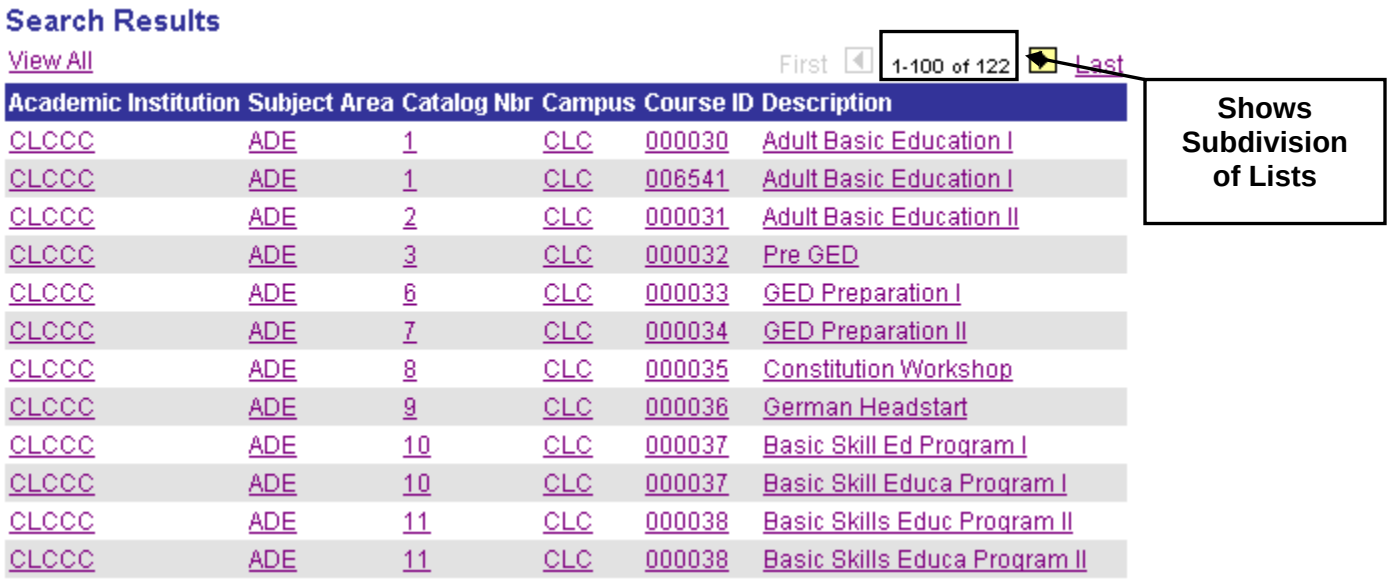


If the list of records is large enough, you may need to use your scroll bar to view all of the associated records.

SUBDIVIDED SEARCH RESULT LIST

If your search criterion matches a large number of records, they may be displayed in a subdivided list. In these cases your list will be distributed on more than one page.

Below is an example of a subdivided search result. In this example, we have returned a list of 122 records, which has been subdivided into two lists. The first list contains 100 records and the second list contains 22 records.



Search Results

View All First 1-100 of 122 Last

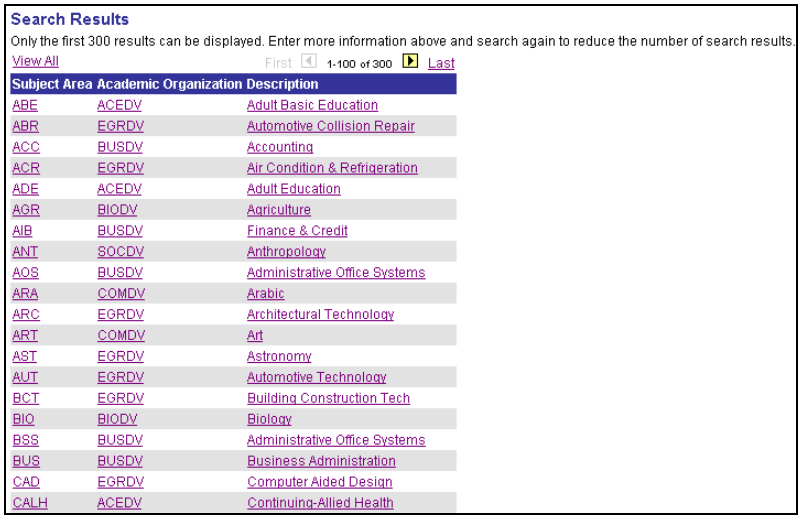
Academic Institution	Subject Area	Catalog Nbr	Campus	Course ID	Description
CLCCC	ADE	1	CLC	000030	Adult Basic Education I
CLCCC	ADE	1	CLC	006541	Adult Basic Education I
CLCCC	ADE	2	CLC	000031	Adult Basic Education II
CLCCC	ADE	3	CLC	000032	Pre GED
CLCCC	ADE	6	CLC	000033	GED Preparation I
CLCCC	ADE	7	CLC	000034	GED Preparation II
CLCCC	ADE	8	CLC	000035	Constitution Workshop
CLCCC	ADE	9	CLC	000036	German Headstart
CLCCC	ADE	10	CLC	000037	Basic Skill Ed Program I
CLCCC	ADE	10	CLC	000037	Basic Skill Educa Program I
CLCCC	ADE	11	CLC	000038	Basic Skills Educ Program II
CLCCC	ADE	11	CLC	000038	Basic Skills Educa Program II

LIST WITH MESSAGE TO NARROW SEARCH

The search function can retrieve up to 300 entries. If your search produces more than the 300 maximum numbers of entries, the following message will appear at the top of your search results list:

Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.

The following is an example of a search which produced more than 300 records.



Search Results

Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.

View All First 1-100 of 300 Last

Subject Area	Academic Organization	Description
ABE	ACEDV	Adult Basic Education
ABR	EGRDV	Automotive Collision Repair
ACC	BUSDV	Accounting
ACR	EGRDV	Air Condition & Refrigeration
ADE	ACEDV	Adult Education
AGR	BIODV	Agriculture
AIB	BUSDV	Finance & Credit
ANT	SOCDV	Anthropology
AOS	BUSDV	Administrative Office Systems
ARA	COMDV	Arabic
ARC	EGRDV	Architectural Technology
ART	COMDV	Art
AST	EGRDV	Astronomy
AUT	EGRDV	Automotive Technology
BCT	EGRDV	Building Construction Tech
BIO	BIODV	Biology
BSS	BUSDV	Administrative Office Systems
BUS	BUSDV	Business Administration
CAD	EGRDV	Computer Aided Design
CALH	ACEDV	Continuing-Allied Health

When this kind of search result occurs you should refine your search by adding additional criteria to get a smaller search result.

MOVING BETWEEN RECORDS IN A SEARCH LIST

When your search produces a large number of records, your search results list will include navigation functions to allow you so move from record to record in the list. Below is a navigation header for a search list:

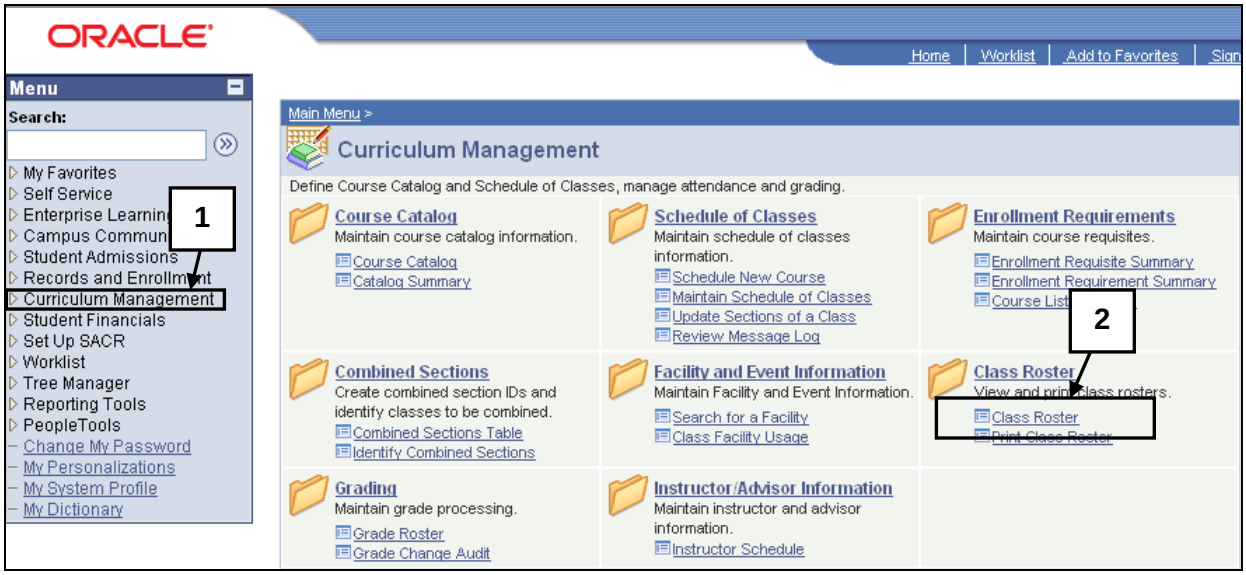
The table that follows provides a list of each navigation tool along with a description:

Button or Link	Function
View All	Allows you to view all records in the search result list on the screen at the same time. **Note:** This will be grayed out if the full search result list is already displayed.
First	Takes you to the first record in the search results list. **Note:** This will be grayed out if you are already on the first record.
Left Arrow	In a single column search result list, moves you one record at a time backward through the search results list. In a subdivided list, moves you backward one list at a time. **Note:** This will be grayed out if you are already on the first record or list.
Right Arrow	In a single column search result list, moves you one record at a time forward through the search results list. In a subdivided list, moves you forward one list at a time. **Note:** This will be grayed out if you are already on the last record or list.
Last	Takes you to the last record in the search results list. **Note:** This will be grayed out if you are already on the last record in the list.

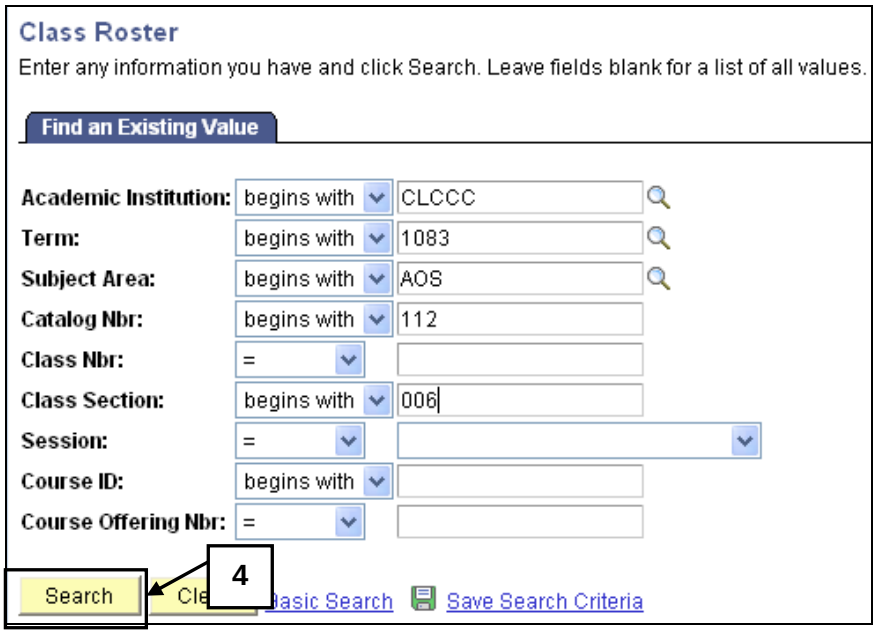
10. PRINTING

Once you have found needed information in PeopleSoft 9.0, you can easily print out the results. We will search for a specific class roster and print it out.

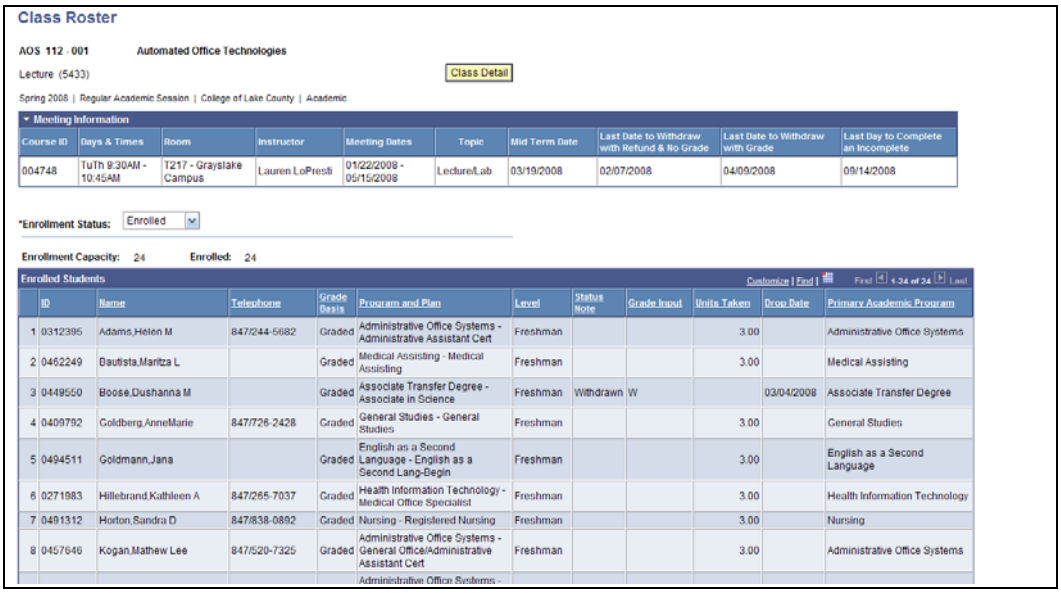
1. Click on **Curriculum Management** in the Menu pagelet.



2. Click on **Class Roster**.
3. Fill in the **search prompts** as seen to the right.
4. Click the **Search** button or press **Enter**.



The class roster will display as seen below.



Class Roster

AOS 112 - 001 Automated Office Technologies

Lecture (5433) Class Detail

Spring 2008 | Regular Academic Session | College of Lake County | Academic

Meeting Information

Course ID	Days & Times	Room	Instructor	Meeting Dates	Topic	Mid Term Date	Last Date to Withdraw with Refund & No Grade	Last Date to Withdraw with Grade	Last Day to Complete an Incomplete
004748	TuTh 9:30AM - 10:45AM	T217 - Grayslake Campus	Lauren LoPresti	01/22/2008 - 05/15/2008	Lecture/Lab	03/19/2008	02/07/2008	04/09/2008	09/14/2008

*Enrollment Status: Enrolled

Enrollment Capacity: 24 Enrolled: 24

Enrolled Students

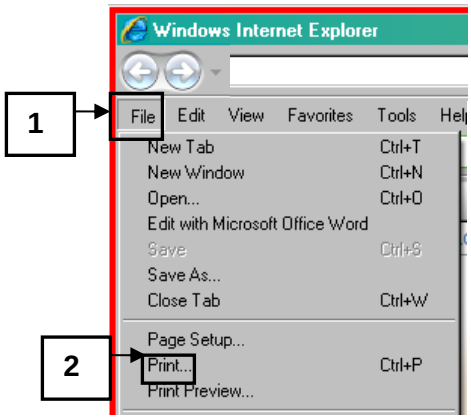
Customize | Find | First 1-24 of 24 Last

	ID	Name	Telephone	Grade Basis	Program and Plan	Level	Status Note	Grade Input	Units Taken	Drop Date	Primary Academic Program
1	0312395	Adams,Helen M	847/244-5682	Graded	Administrative Office Systems - Administrative Assistant Cert	Freshman			3.00		Administrative Office Systems
2	0462249	Bautista,Maritza L		Graded	Medical Assisting - Medical Assisting	Freshman			3.00		Medical Assisting
3	0449550	Boose,Dushanna M		Graded	Associate Transfer Degree - Associate in Science	Freshman	Withdrawn	W		03/04/2008	Associate Transfer Degree
4	0409792	Goldberg,AnneMarie	847/726-2428	Graded	General Studies - General Studies	Freshman			3.00		General Studies
5	0494511	Goldmann,Jana		Graded	English as a Second Language - English as a Second Lang-Begin	Freshman			3.00		English as a Second Language
6	0271983	Hillebrand,Kathleen A	847/265-7037	Graded	Health Information Technology - Medical Office Specialist	Freshman			3.00		Health Information Technology
7	0491312	Horton,Sandra D	847/838-0892	Graded	Nursing - Registered Nursing	Freshman			3.00		Nursing
8	0457646	Kogan,Mathew Lee	847/520-7325	Graded	Administrative Office Systems - General Office/Administrative Assistant Cert	Freshman			3.00		Administrative Office Systems

Administrative Office Systems -

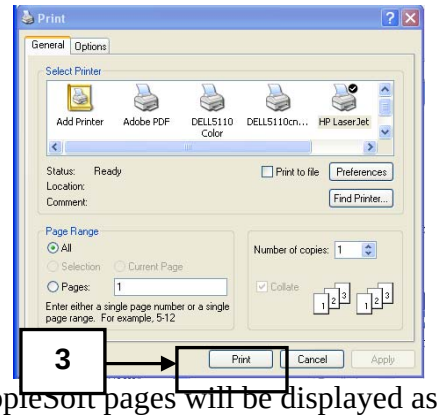
PRINTING OPTION #1 – FILE > PRINT

1. Select **File** from the main menu in Microsoft Internet Exlorer.
2. Select **Print**.



The Print window displays.

3. Click the **Print** button to send the roster to the printer.

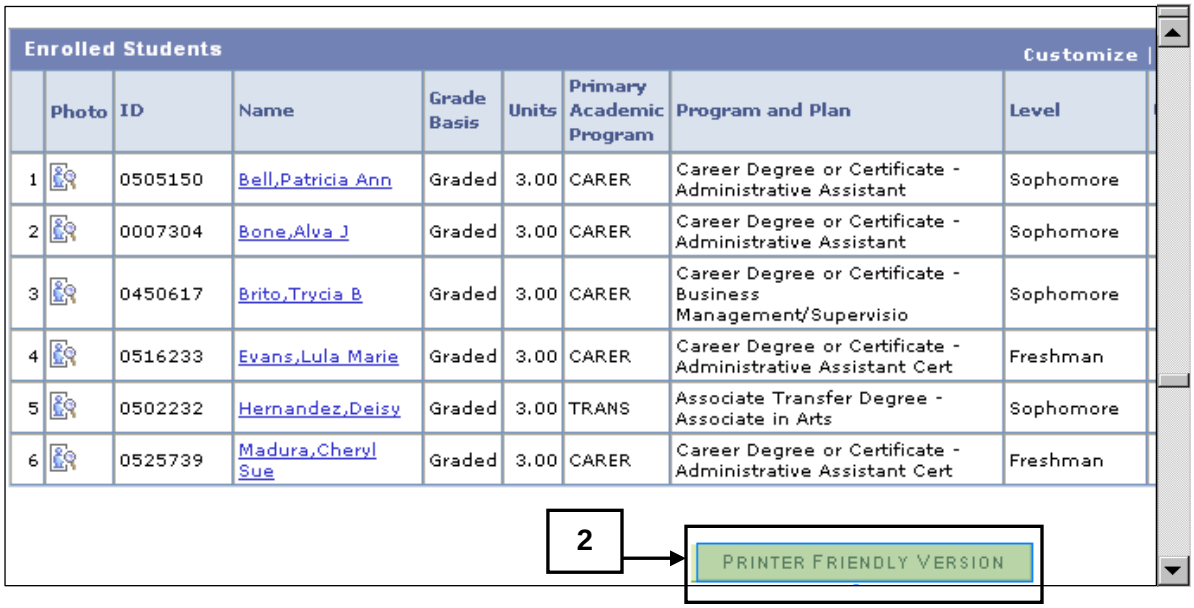


Note Any printed output from PeopleSoft pages will be displayed as a .pdf file in the reports manager. It is no longer necessary to go to a 'Reports Drive' to get output.

PRINTING OPTION #2 – PRINTER FRIENDLY VERSION

Some windows will include a "Printer Friendly Version" button. This button will allow you to preformat the screen to fit on an 8-1/2" x 11" piece of paper.

1. While the class roster is displayed, **scroll to the bottom** of the roster.
2. Click on the **Printer Friendly Version** button.

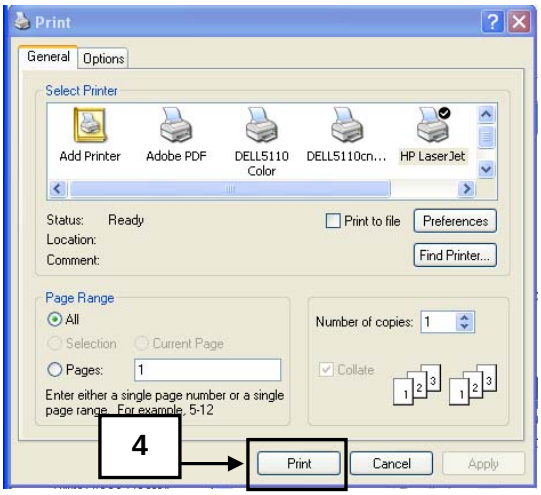


The printer friendly version of the roster appears on the screen.

3. Click **Ctrl+P**.

The print window appears.

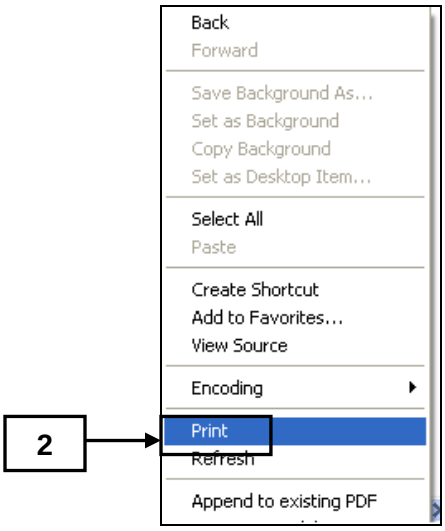
4. Click **Print** to print the roster.



PRINTING OPTION #3 – RIGHT-CLICK

1. **Right**-click anywhere on the roster page.

A dialogue box appears.



2. Select **Print**.

The print window appears.

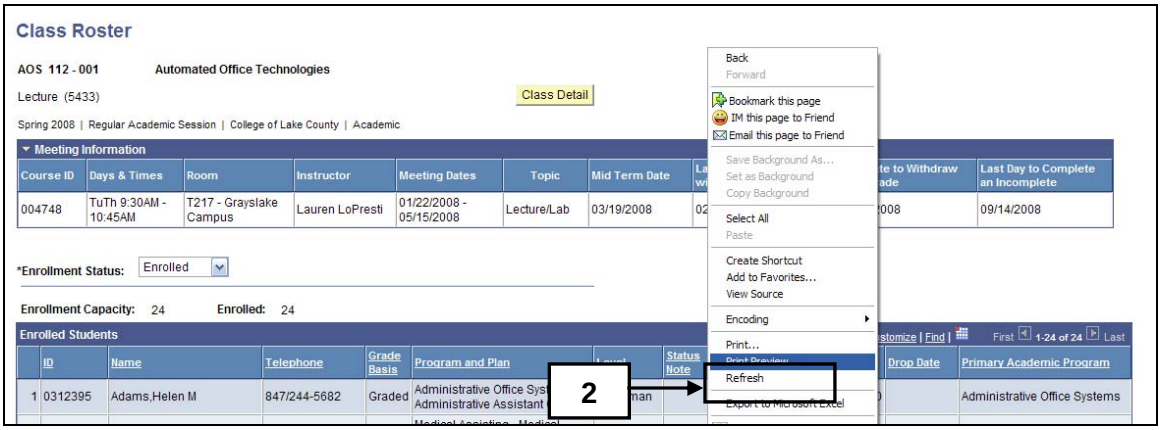
3. Click **Print** to print the roster.

PRINTING OPTION #4 – RIGHT-CLICK FOR INFORMATION THAT IS LARGER THAN A SCREEN

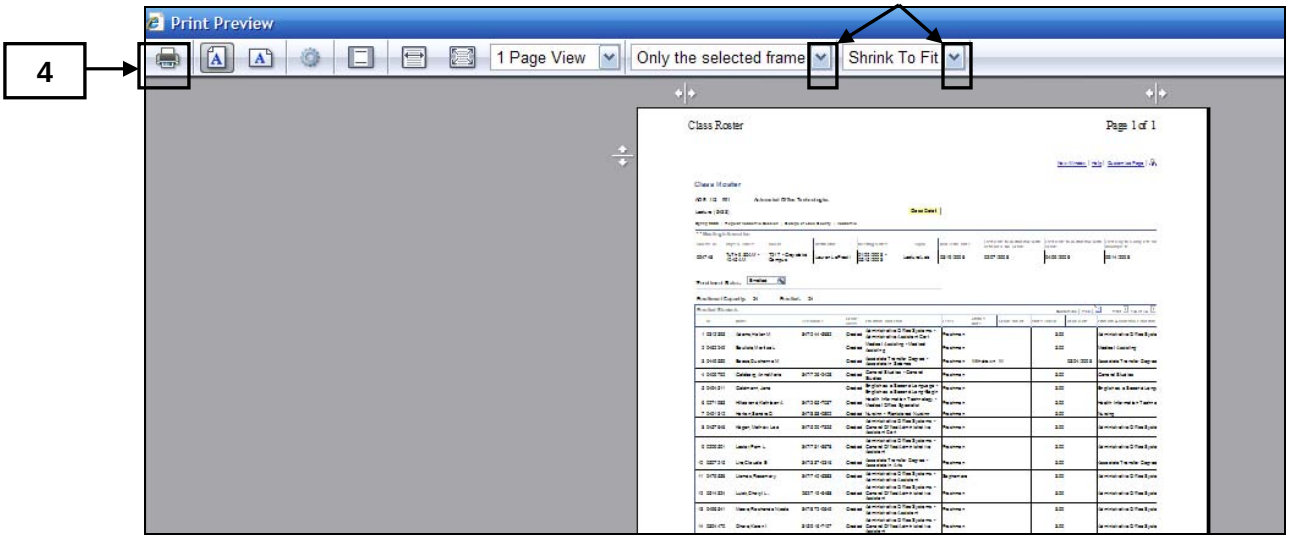
1. **Right-click** anywhere on the roster page.

The dialogue box appears

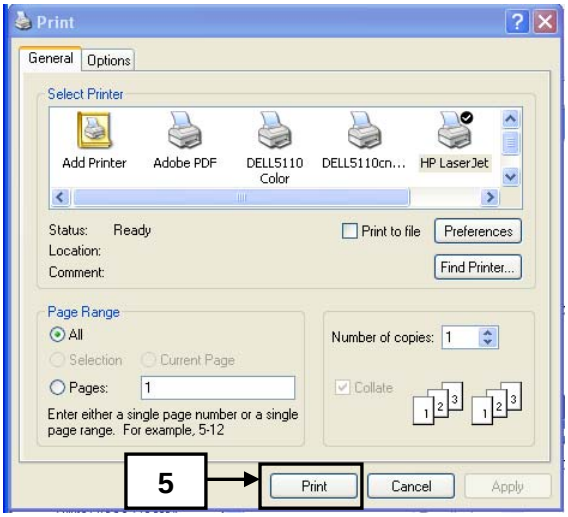
2. Select **Print Preview**.


Class Roster
AOS 112 - 001 Automated Office Technologies
Lecture (5433)
Class Detail
Spring 2008 | Regular Academic Session | College of Lake County | Academic
Meeting Information
Course ID
Days & Times
Room
Instructor
Meeting Dates
Topic
Mid Term Date
Last Day to Complete an Incomplete
004748
TuTh 9:30AM - 10:45AM
T217 - Grayslake Campus
Lauren LoPresti
01/22/2008 - 05/15/2008
Lecture/Lab
03/19/2008
09/14/2008
*Enrollment Status: Enrolled
Enrollment Capacity: 24
Enrolled: 24
Enrolled Students
ID
Name
Telephone
Grade Basis
Program and Plan
Status Note
Drop Date
Primary Academic Program
1 0312395 Adams,Helen M 847/244-5682 Graded Administrative Office Sys Administrative Assistant
Administrative Office Systems
Back
Forward
Bookmark this page
IM this page to Friend
Email this page to Friend
Save Background As...
Set as Background
Copy Background
Select All
Paste
Create Shortcut
Add to Favorites...
View Source
Encoding
Print...
Refresh
2

3. On the Print Preview window, select **Only the selected fram[illegible] Shrink to Fit**.
4. Click **Print**.



The print window appears.

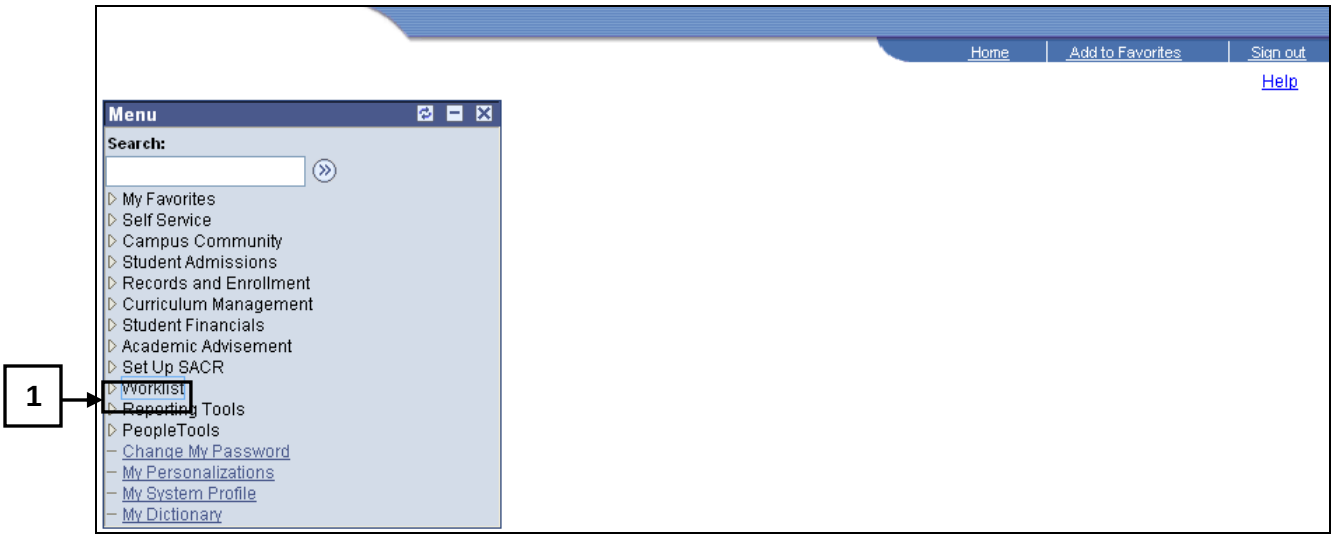


5. Click **Print** to print roster.

11. USING 19th 41st HOUR

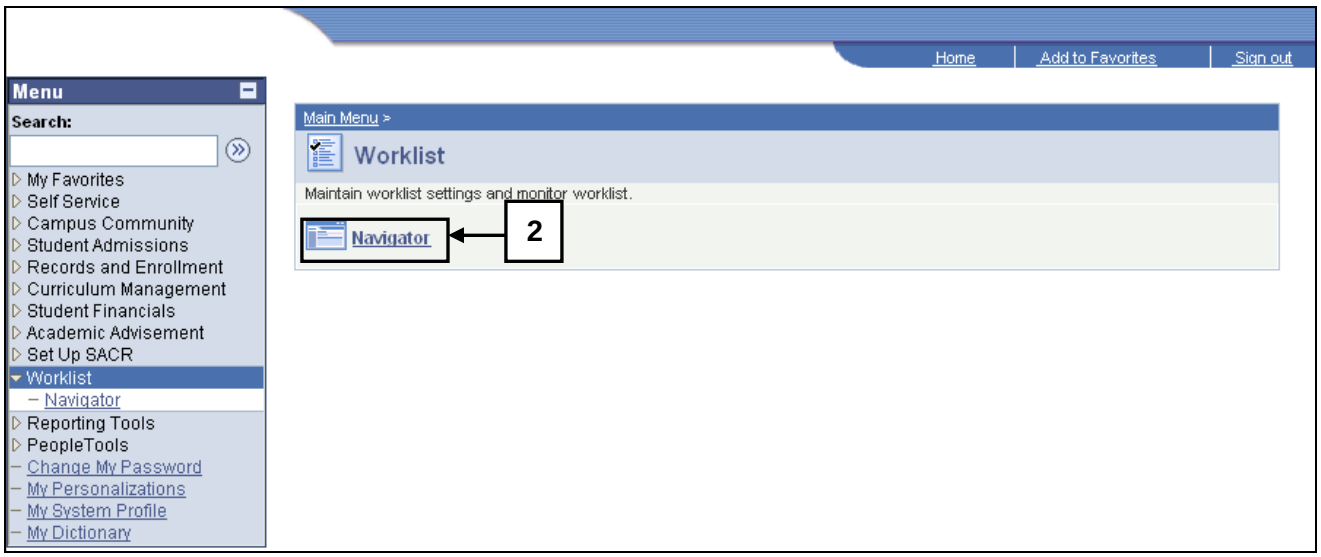
To access 19th 41st Hour:

1. Click on **Worklist**.



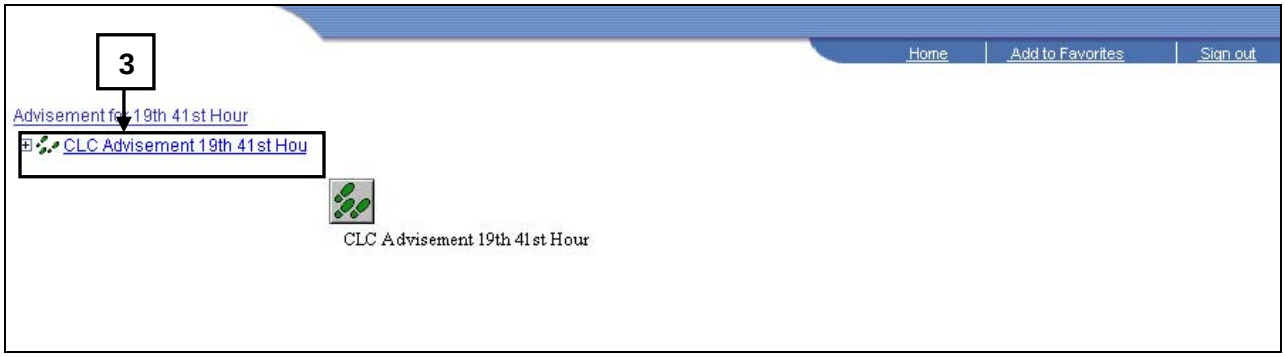
Worklist Main Menu displays.

2. Click on **Navigator**.



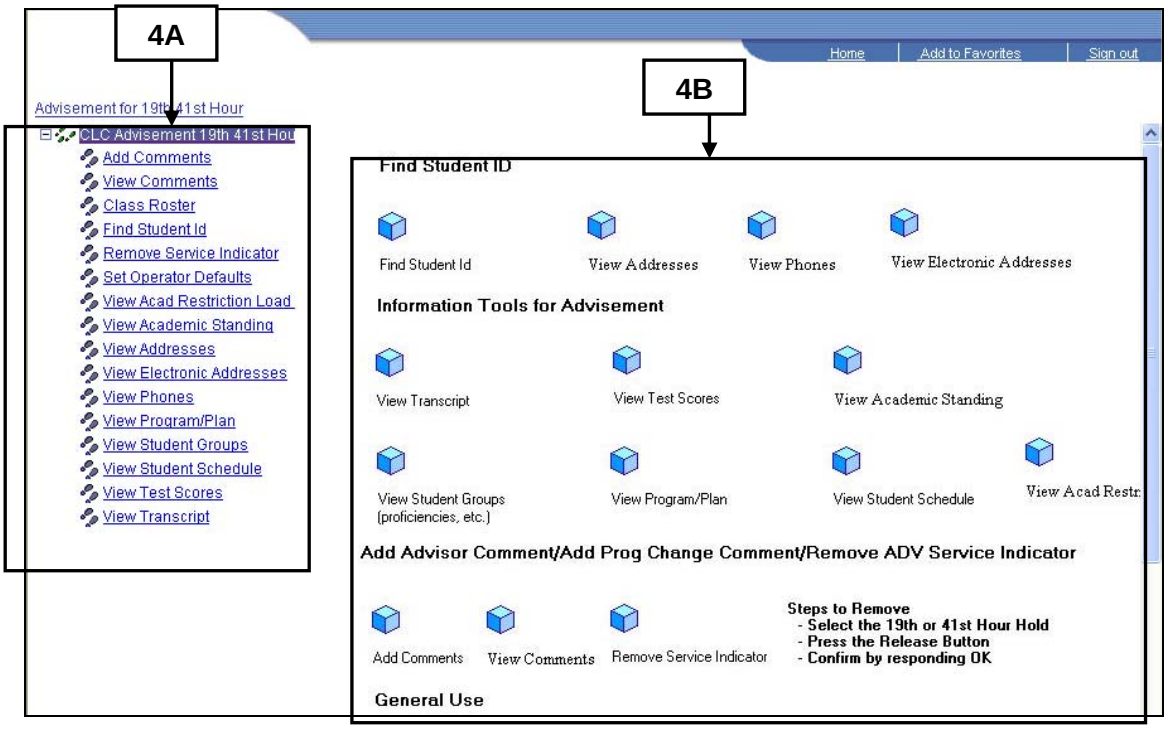
Advisement for 19th 41st Hour displays.

3. Click **CLC Advisement 19th 41st Hour**.



CLC Advisement 19th 41st Hour footprints display.

4. Choose the one you want from the list on the left (A) OR from the icons on the right (B).



12. DATA NAVIGATION

TABBING BETWEEN FIELDS

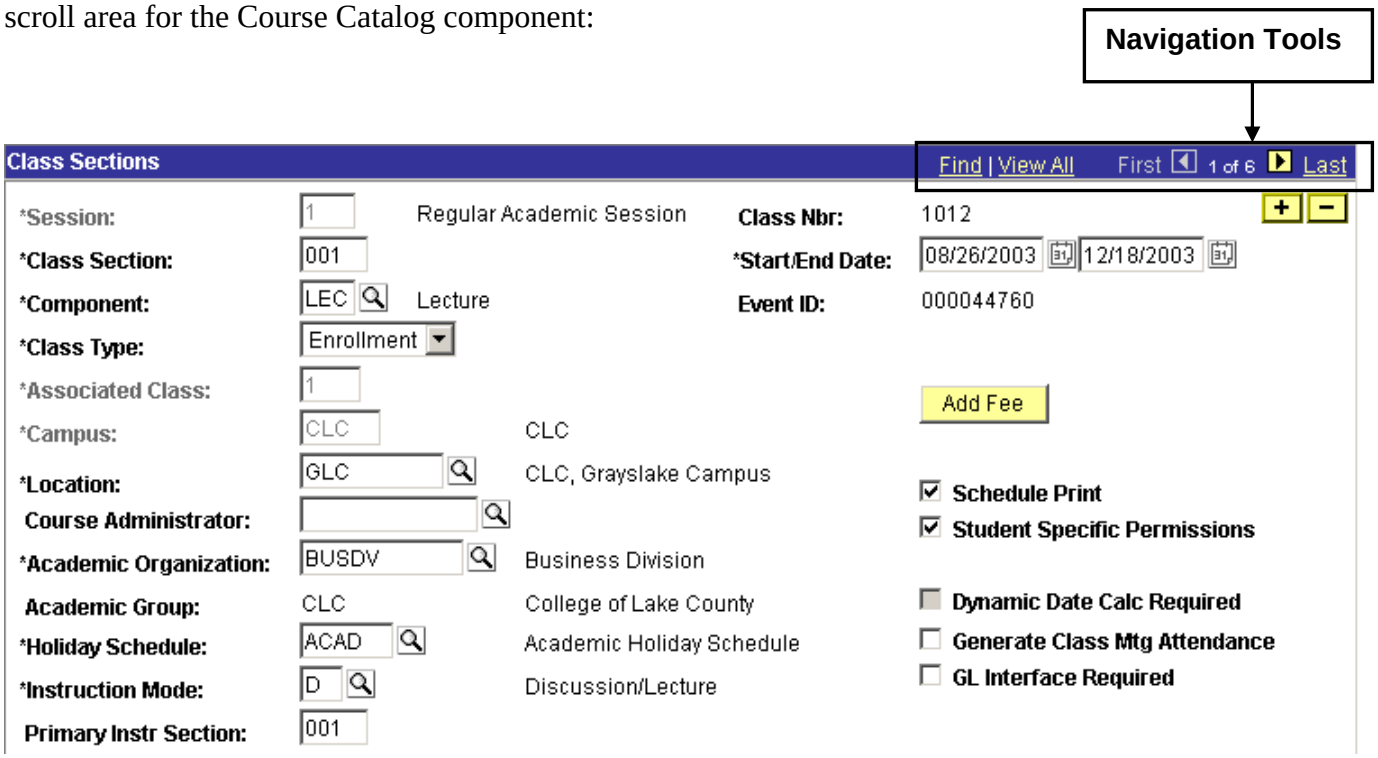
When you are in a data entry screen, you should press your [Tab] key to move to the next data field in the window. The [Tab] key moves you one field at a time in a predetermined sequence in the window. To move to the next field, press the [Tab] key again. To move backward one field at a time in the window, press [Shift]+[Tab].

Note You may also click on any edit box in the page rather than tabbing to it.

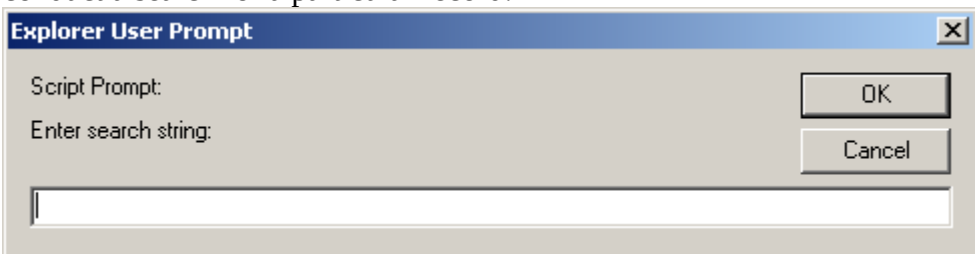
SCROLL AREAS

Scroll areas allow you to view one record at a time in a page. Each component in the system is made up of one or more scroll areas. Each scroll area contains information that is randomly arranged on the screen.

A scroll area looks like a data entry page with navigation tools in the header. Below is an example of a scroll area for the Course Catalog component:



To navigate though the data in the scroll area, use the navigation tools in the header. A description of each of these navigation tools can be found in the "Moving Between Records in a Search List" section of this manual. However, there is one additional tool for navigation in a scroll area, the Find function, which is described in the table below:

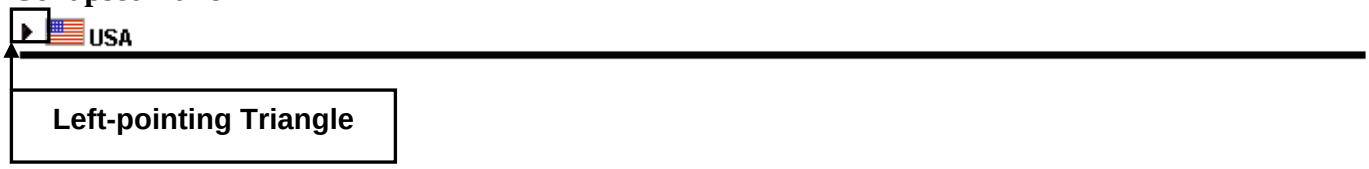
Button or Link	Function
Find Find	Brings up a search dialog box, where you can type in any combination of words to conduct a search for a particular record:  To use the search function, type your search string and press the OK button. **Note:** This will be grayed out if there is only a single record.

COLLAPSIBLE AREAS

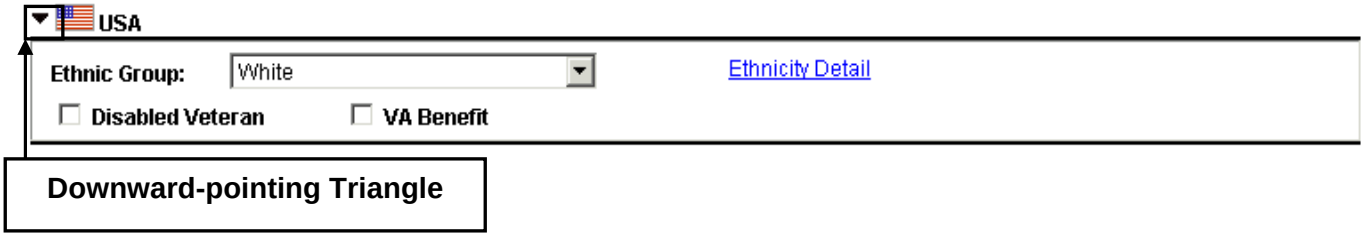
Some of the scroll areas can be collapsed entirely and then expanded. Scroll areas containing a right-pointing triangle, ▸, in front of the heading, have been collapsed, and none of the data in the area will be in view. Panels containing a downward-pointing triangle, ▾, are expanded, so that all of the data in the panel is in view. To collapse an expanded area, click the downward-pointing arrow, ▾, to the left of the heading.

Below are collapsed and expanded versions of the same area:

Collapsed Panel



Expanded Panel



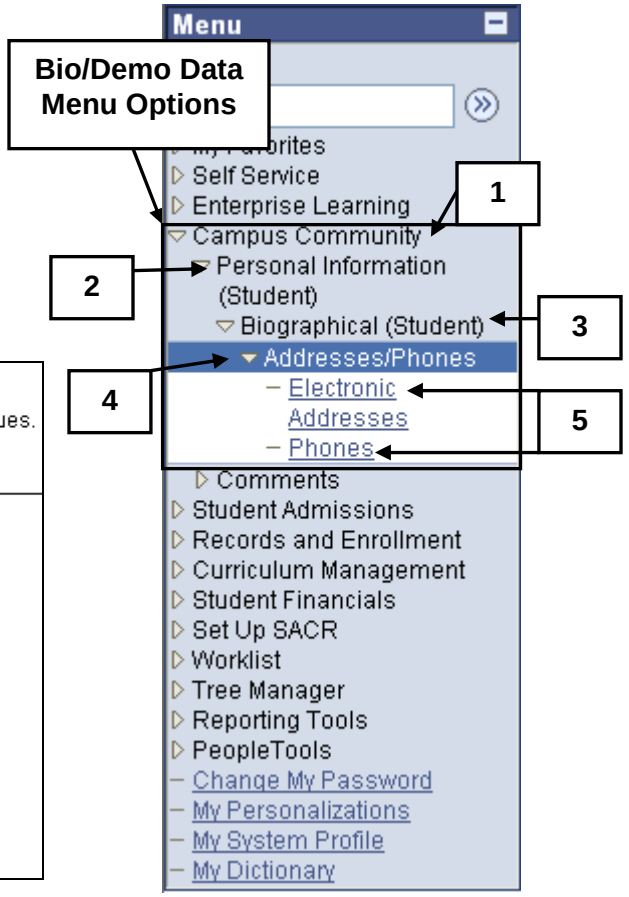
! Warning ! – Do not keep pushing the same button repeatedly. The system will need time to respond to each request. Always wait until the current function completes before pushing the same or additional buttons.

SEARCHING FOR BIO/DEMO DATA IN THE SYSTEM

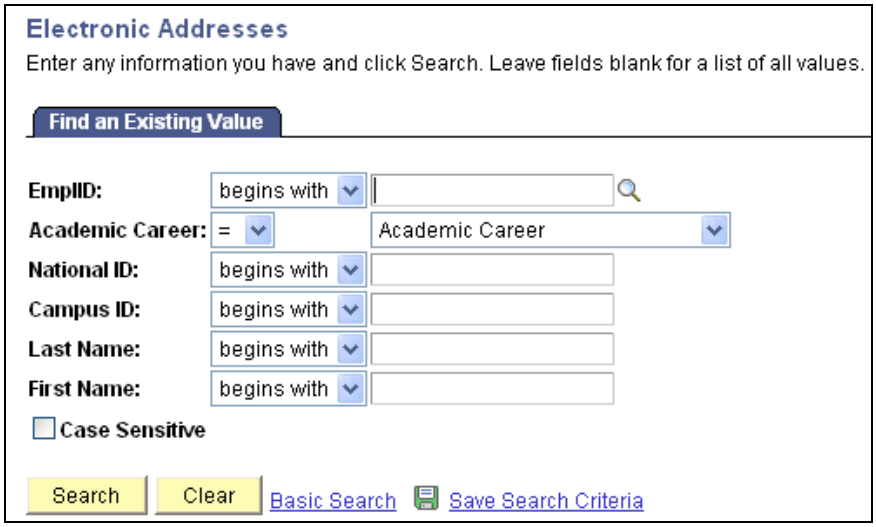
Not all users at the college will have access to the Bio/Demo component in the system. However, we have included this section as many users will have access to this area.

To look up people information in the system:

1. Click on **Campus Community** in the menu pagelet.
2. Click on **Personal Information (Student)** in the submenu.
3. Click on **Biographical (Student)** in the submenu.
4. Click on **Addresses/Phones** in the submenu.
5. Click on **Electronic Addresses** or **Phone** hyperlink.



A search screen will display.



6. **Conduct a search for the desired student.**
7. **Select the record for the desired person.**

13. SETTING USER DEFAULTS

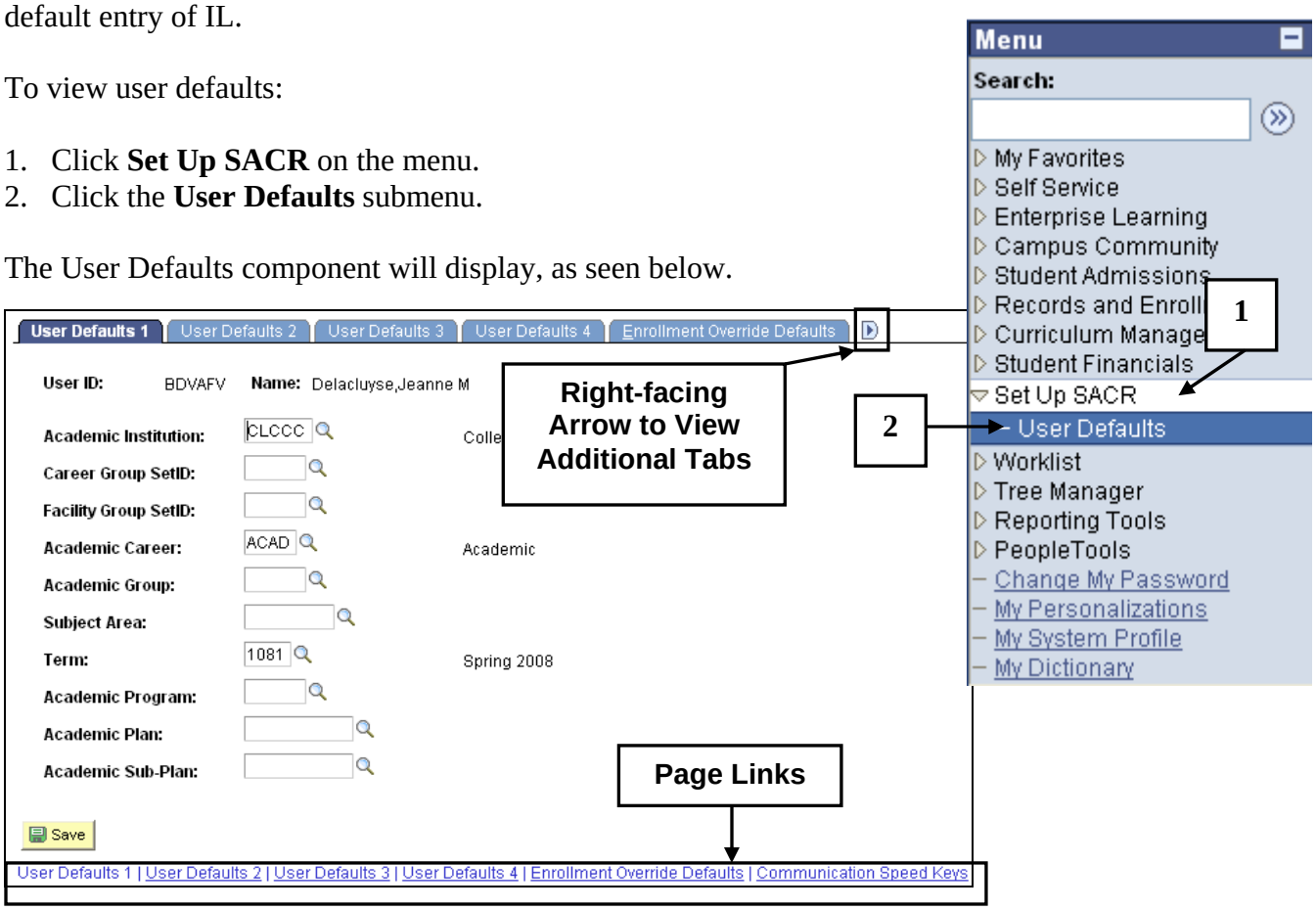
To save time on data entry, you can set up the system so that it will automatically fill in certain fields for you with default values. Setting up default values eliminates the need to key values for these fields. You can simply press [Tab], and the default value will automatically be entered. For example, if most CLC students live in Illinois, you could set the default value for the State field to IL.

Even after establishing default values for fields, you may override default values at any point during the data entry process by simply typing over existing values. For example, if you have a student who lives in Wisconsin, rather than Illinois, you can type WI in the state field, and the WI entry will override the default entry of IL.

To view user defaults:

1. Click **Set Up SACR** on the menu.
2. Click the **User Defaults** submenu.

The User Defaults component will display, as seen below.



Notice that there are five different default value categories that appear as tabs across the top of User Defaults screen:

- User Defaults 1
- User Defaults 2
- User Defaults 3
- User Defaults 4
- Enrollment Override Defaults

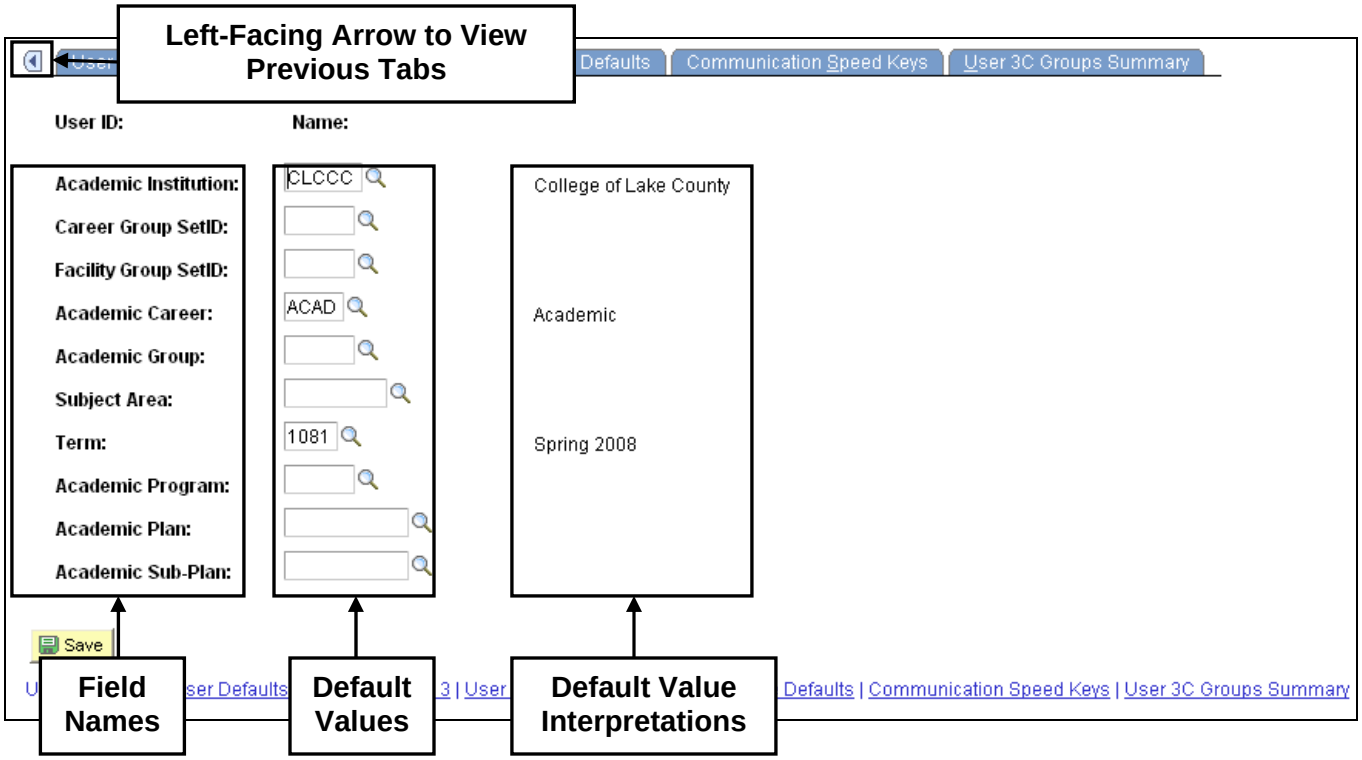
There are two additional categories that do not display, Communication Speed Keys and User 3C Group Summary. To access these areas, simply click on the page links at the bottom of the screen or click on the right-facing arrow to the left of the page tabs.

In the screen above, you can see only the first five default value category tables. However, all seven of the default value categories appear as links at the bottom of the page.

Each of these tabs, or links, includes a different set of fields for which you can set defaults. Also notice the right-facing arrow, , at the end of the default value category tabs. If the right-facing arrow, , is present in the tabs row it indicates that there are additional tabs, that are not shown.

3. To see the additional **categories of default values, press this arrow, ,** at the end of the tabs and the additional tab will appear, or simply click on the **default value hyperlinks** at the bottom of the page.

If you click on the right-facing arrow at the end of the default category tabs, , you will now see any additional default value category tabs that are available. In this case, we can now see the Communication Speed Keys and User 3C Groups Summary tabs. Once you click on the right-facing arrow, , you will see a left-facing arrow, , indicating that the tabs have been expanded. To view the original default value category tabs, click on the left-facing arrow, , to the left of the tabs.



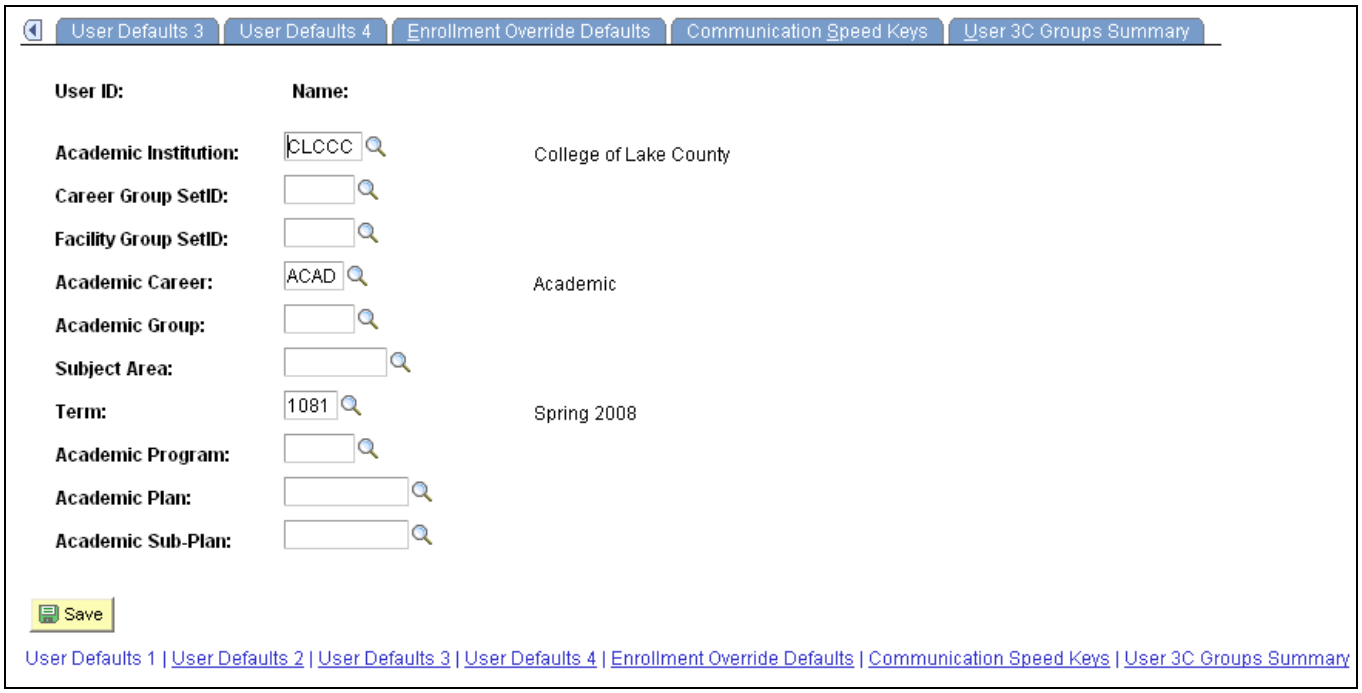
Clicking on any of the default value category tabs, or links, will bring up a screen of available fields. Three types of information are available on the User Defaults page:

- **Field Names** - appear in bold in the first column of the screen and contain the names of the data fields.
- **Default Values** - appear in the second column and contain the default value for the field, if one is defined. If the default value box is left empty, there is no default defined for the field. These values are usually stored as codes in the system.
- **Default Value - Interpretations** appear in the third column and provide text interpretations for the default values, or codes, in the system.

For example, in the screen above, you will see that the first default value, Academic Institution, is CLCCC, which stands for College of Lake County. You will also note that some of the values have been given a default value. However, other fields have been left blank. You set your system defaults to make data entry easier for you.

To create a default value for a field:

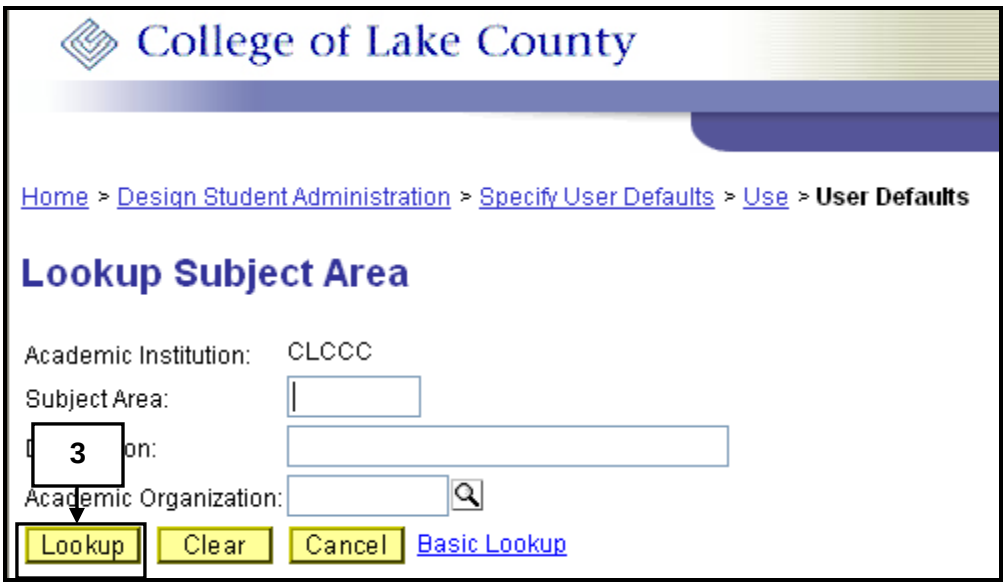
1. Click on the **tab containing the field for which you would like to create a default value.** If you are unsure, you may need to click on different tabs to locate the field.
2. Click on the **magnifying glass, , to the right of the default value box for the field** for which you would like to create a default value.



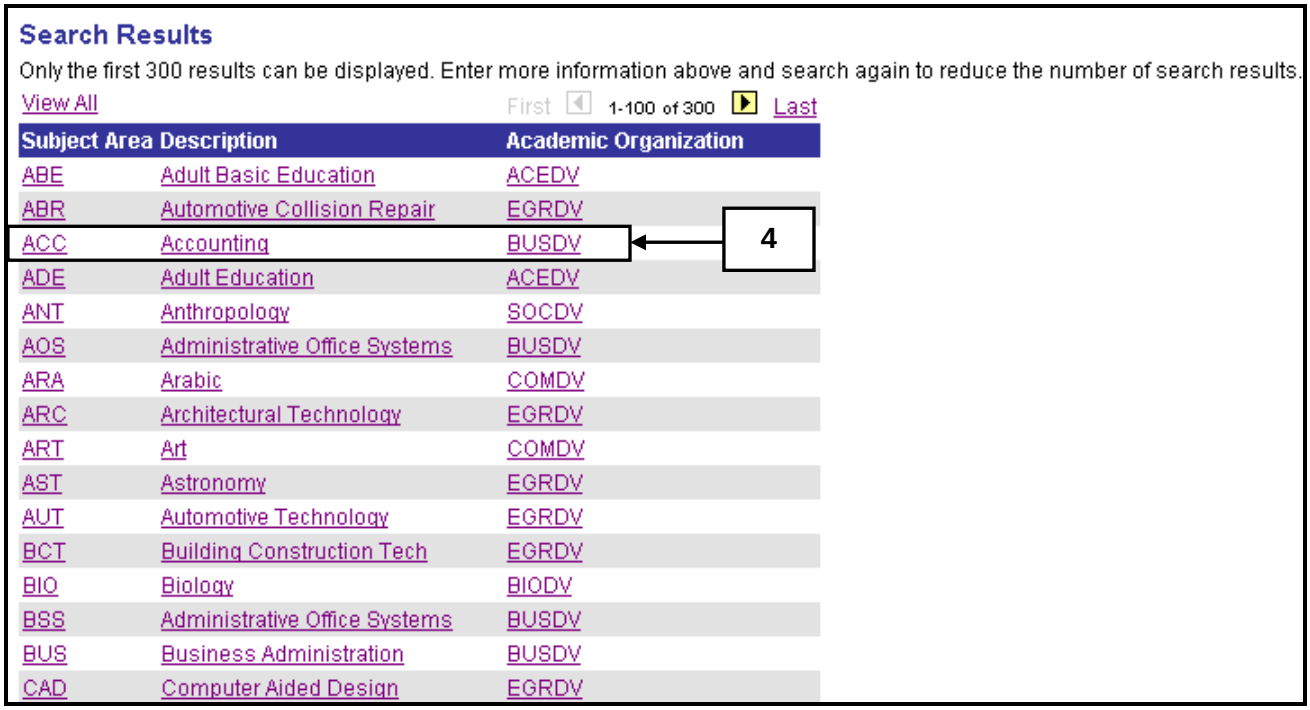
A lookup screen will appear. In this screen you will want to look up the values that are acceptable for this field. There is security built into the database that ensures that the correct type of data is entered into a field. Therefore, you cannot simply type in any value of your liking.

Note: The term code is always a four-digit code beginning with the number 1. The second and third numbers in the term code are the last two digits of the year. The fourth and last digit in the code represents the semester; the first semester of the year (spring semester) is 1, the second semester (summer semester) is 2, and the third semester (fall semester) is 3. For example, the fall semester for the year 2008 would be represented by the code 1083, where 08 is the last two digits of the year and 3 is the third semester of the years.

3. Click on the **Lookup button**, to see a list of acceptable entries for the field.



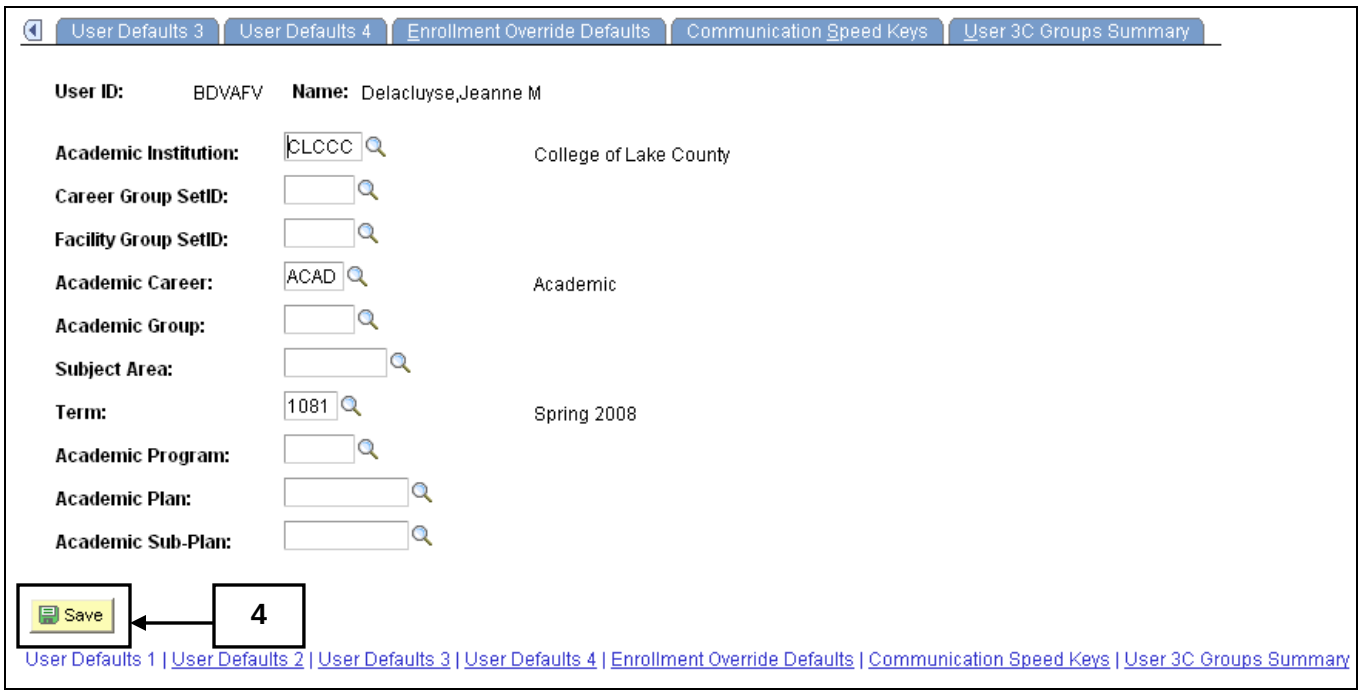
You will now see list of acceptable entries at the bottom of the lookup screen.



4. From the search results list, click on the **default value you would like for the field.** The new default value will now be entered in the User Defaults screen.

In this case we have selected Accounting as our default Subject Area.

5. Click the **Save** button, and the user defaults will be saved and made effective immediately.



Tip: When setting default values keep in mind that some fields are related to one another. For example, you may select a default value that is in conflict with one of the original default values in another field. When this occurs, the original default value will be removed; and you will need to re-enter a default value that is appropriate.

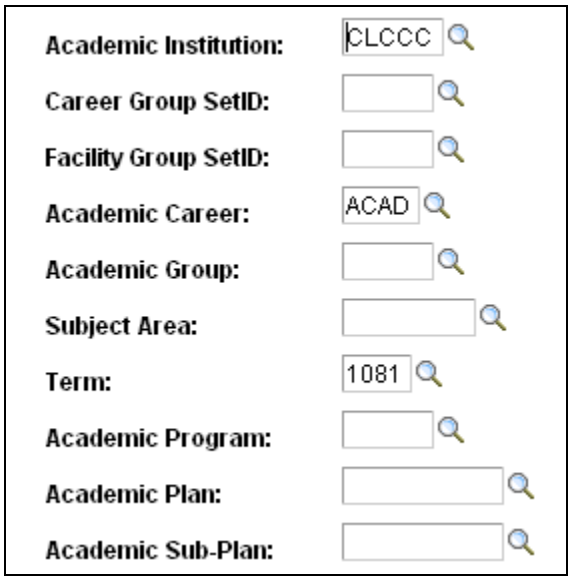
FIELDS WITH DEFAULTS VALUE OPTIONS

In the following section we will look at the specific fields for which you can set defaults.

Note: Please keep in mind that your default pages may appear different than the images on these pages.

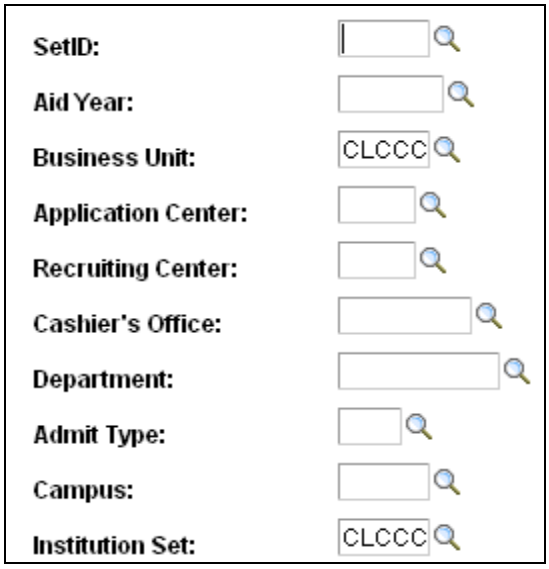
USER DEFAULTS 1

Below is a screen display showing the fields available for setting defaults in the User Defaults 1 tab:



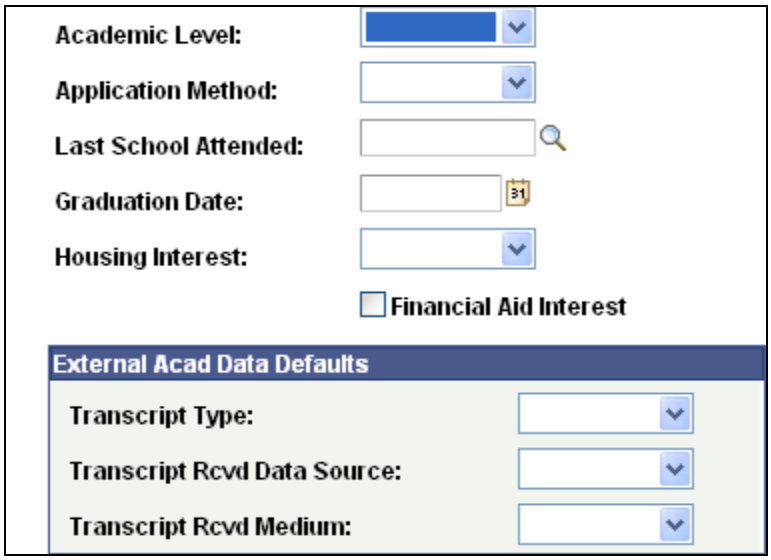
USER DEFAULTS 2

Below is a screen display showing the fields available for setting defaults in the User Defaults 2 tab:



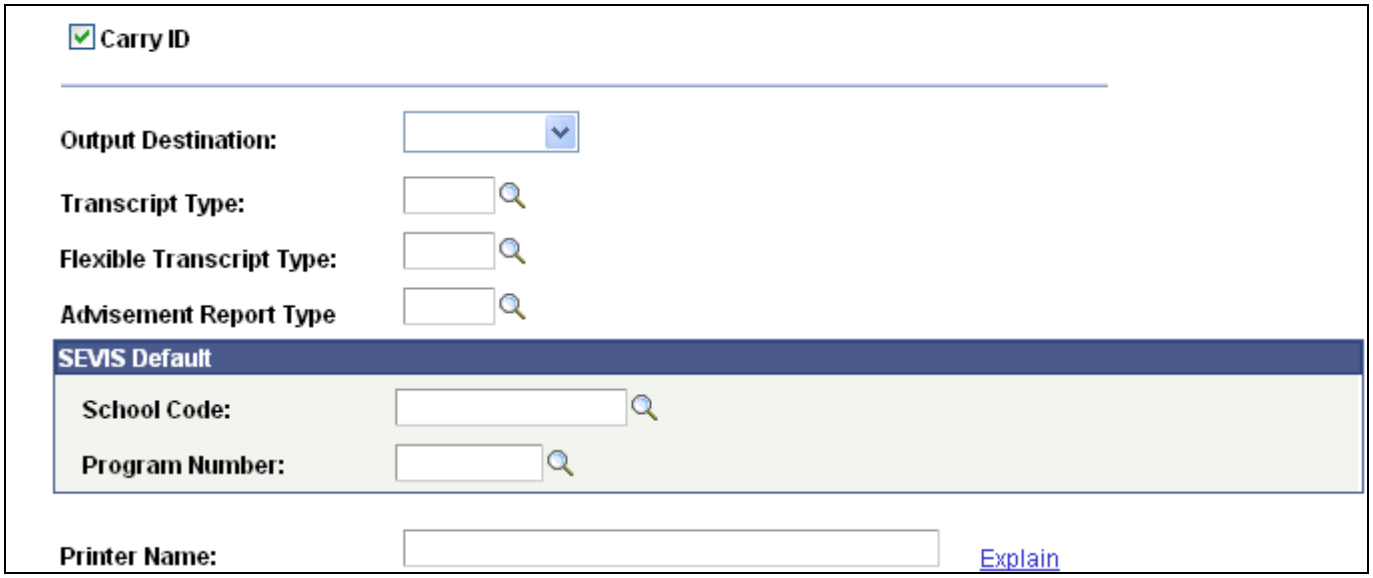
USER DEFAULTS 3

Below is a screen display showing the fields available for setting defaults in the User Defaults 3 tab:



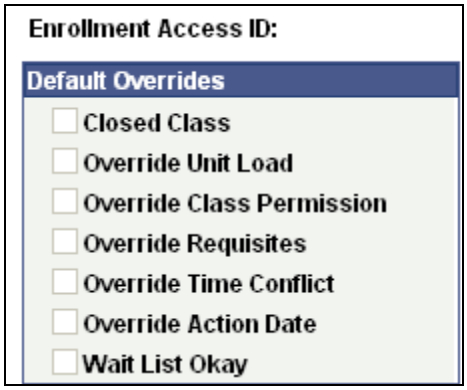
USER DEFAULTS 4

Below is a screen display showing the fields available for setting defaults in the User Defaults 4 tab:



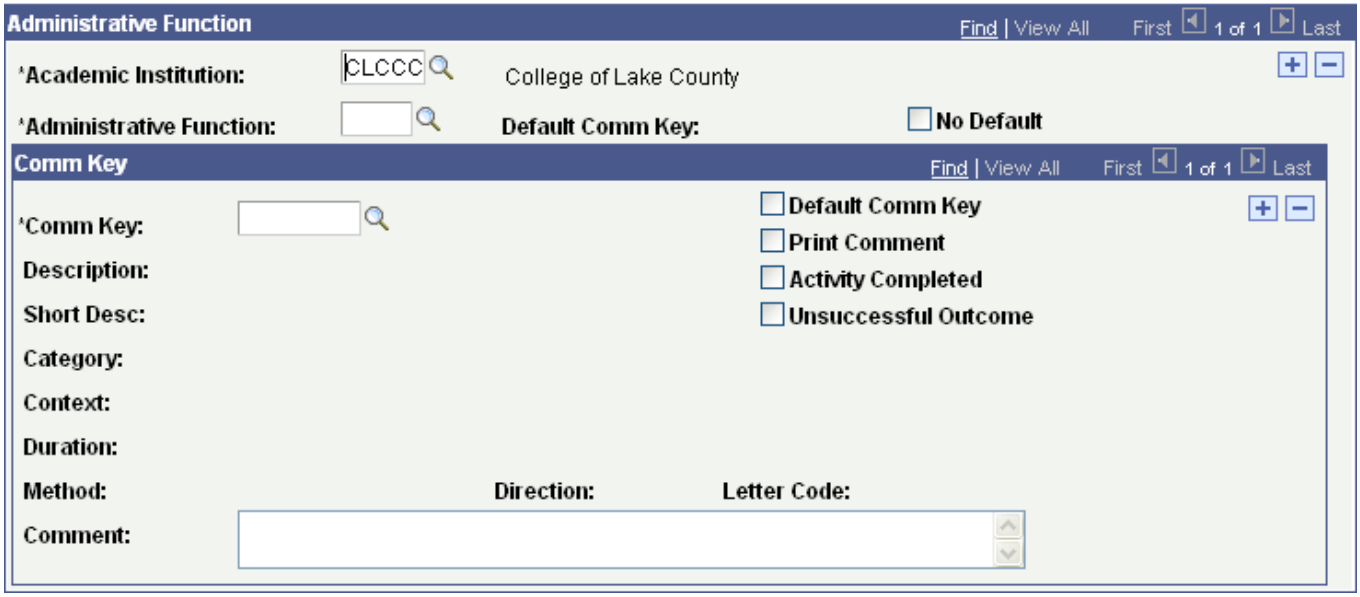
ENROLLMENT OVERRIDE DEFAULTS

Below is a screen display showing the fields available for setting defaults in the Enrollment Override Defaults tab:



COMMUNICATIONS SPEED KEYS DEFAULTS

Below is a screen display showing the fields available for setting defaults in the Communications Speed Keys Defaults tab:



USER 3C GROUPS SUMMARY DEFAULTS

Below is a screen display showing the fields available for setting defaults in the User 3C Groups Summary Defaults tab:

Operator Group Summary

Institution	Description	Inquiry Indicator	Update Indicator
College of Lake County	Admissions	☑	☐
College of Lake County	Faculty Advisor	☑	☑
College of Lake County	Business Division	☑	☑

14. USING SELF SERVICE

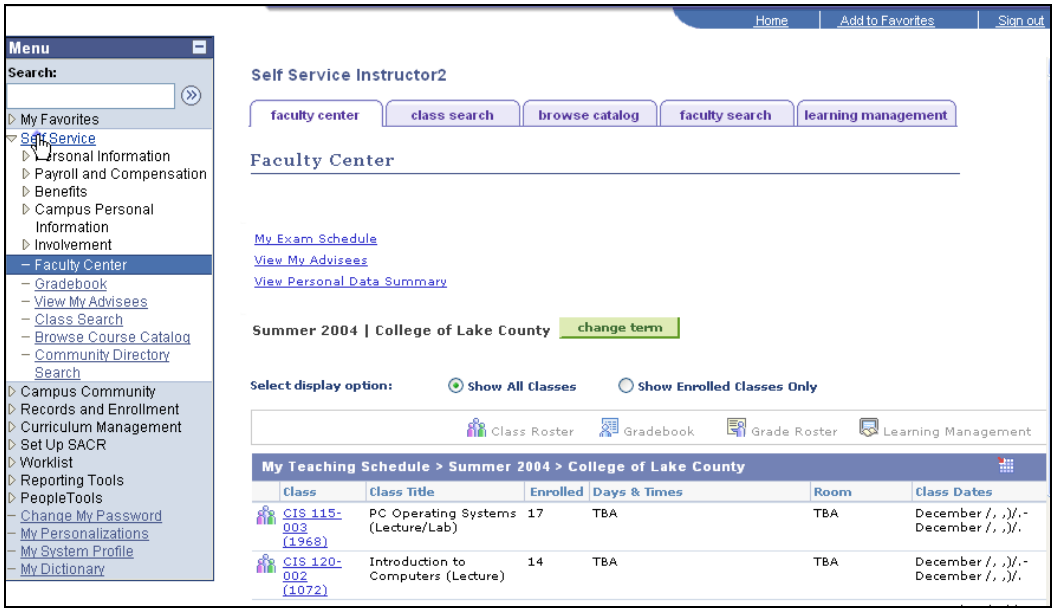
The Self Service area in PeopleSoft 9.0 contains the following areas:

1) Personal Information
2) Payroll and Compensation
3) Benefits
4) Campus Personal Information
5) Involvement

The Self Service can be accessed using the main menu and can be used by staff to look up specific information including:

- Home and mailing addresses
- Phone numbers
- Email addresses
- Emergency contacts
- Marital status
- Name changes
- Paycheck
- Direct deposit
- Compensation history
- W-4 tax information
- W-2 reissue request
- Faculty event tracking

As you can see, in the screen below, Self Service also enables you to go directly to specific PeopleSoft pages, such as Faculty Center.



On the Faculty Center page, you can View Advisees and get a list of all classes being taught by term. You can also click on the tabs across the top and access:

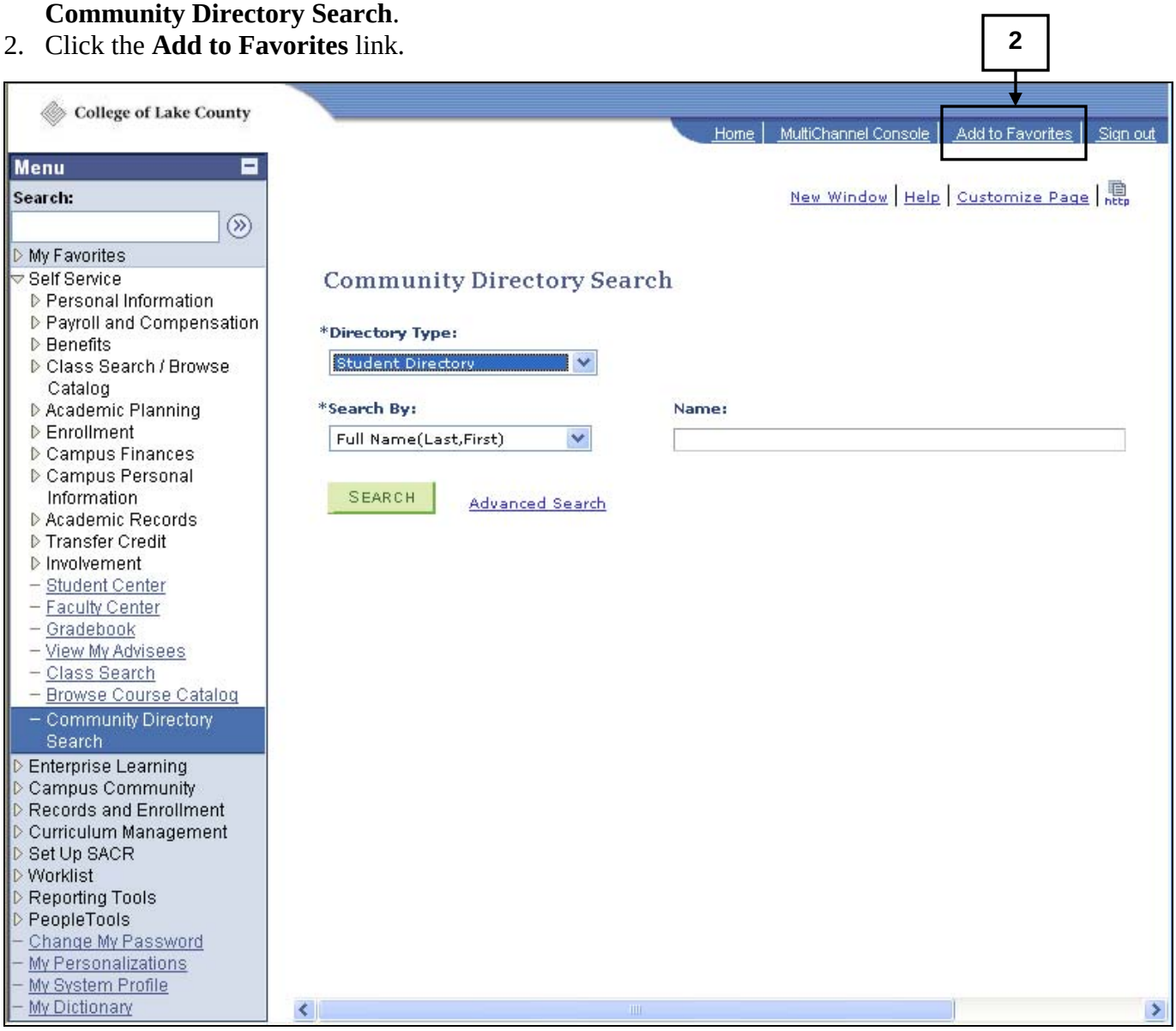
- Class Search
- Browse Catalog
- Faculty Search
- Learning Management

15. WORKING WITH FAVORITES IN PEOPLESOFT 9.0

ADDING FAVORITES

Once you start working in PeopleSoft 9.0, you will be able to set up Favorites within PeopleSoft the program. This is different from previous versions of PeopleSoft which relied on the Favorites tool inside the Microsoft Internet Explorer browser to manage Favorites.

1. Navigate to the Community Directory Search page using the path **Self Service > Involvement > Community Directory Search**.
2. Click the **Add to Favorites** link.



The following window on the right appears. The Description field contains the name of the favorite. You can edit the description as needed. In this case we will keep Course Catalog as the Favorite name.

3. Click the **OK** button.

The Page is added to the My Favorites menu item.

4. Click on **My Favorites** in the Menu pagelet.

You will now see your Favorites, including Community Directory Search.

5. Click on the **Community Directory Search** link in My Favorites.

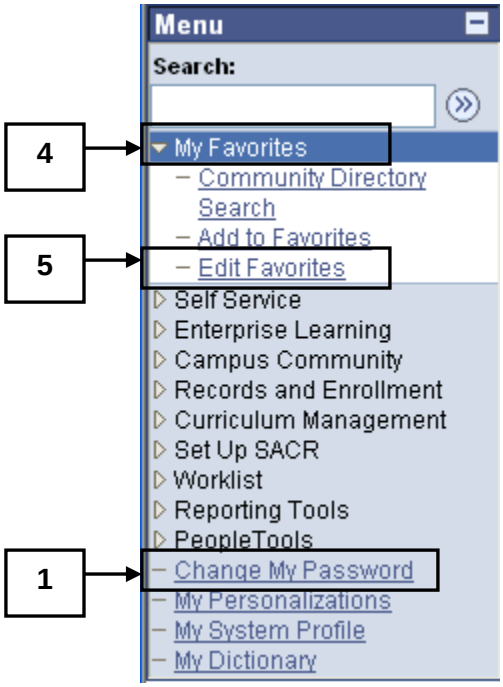
You will return to the Course Catalog search screen.

SEQUENCING AND EDITING FAVORITES

You can order your list of favorites in whatever sequence works best for you. The default is alphabetical order by menu page name, and the default sequence number is zero.

Let's add a second favorite.

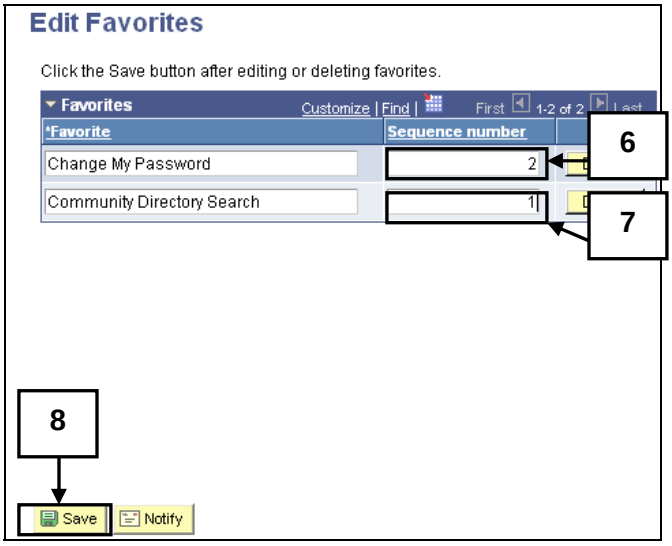
1. Click on the **Change My Password** link in the Menu pagelet.



2. Click the **Add to Favorites** link.
3. Click the **OK** button.
4. Select **My Favorites** in the Menu Pagelet.
5. Select the **Edit Favorites** link under My Favorites in the Menu Pagelet.

The Edit Favorites page displays. Each favorite has 0 for a sequence number. This is the default setting that sorts items in alphabetical order. To change the sort order you must change the sequence numbers.

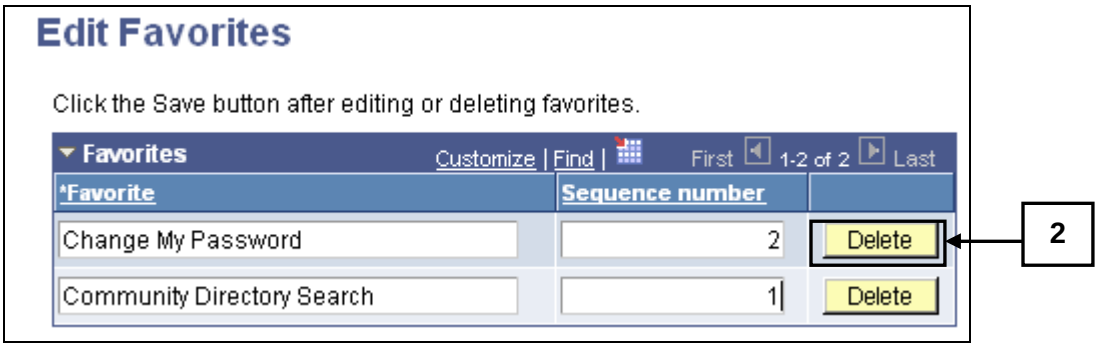
6. Change the Sequence number for Change My Password to **2**.
7. Change the Sequence number for Community Directory Search to **1**.
8. Click the **Save** button.



DELETING FAVORITES

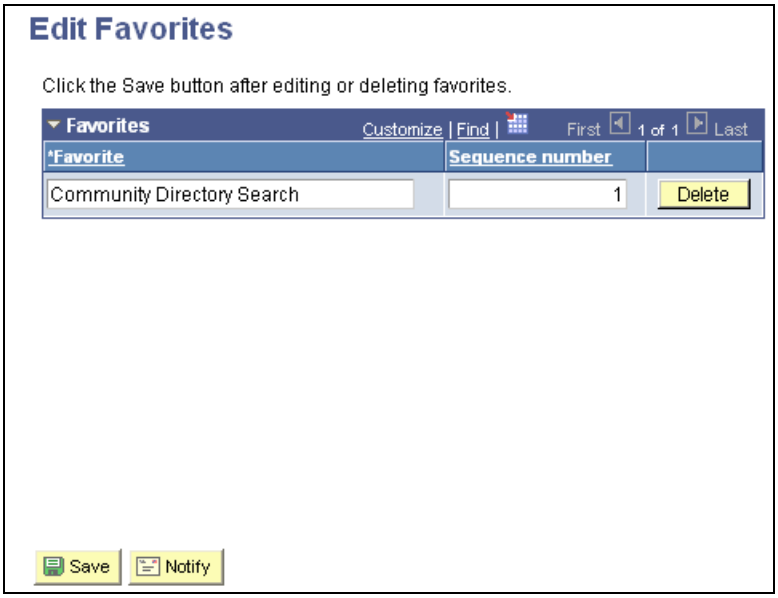
Let's delete the Change My Password favorite we just created.

1. Select **Edit Favorites** under My Favorites in the Menu pagelet.
2. Click the **Delete** button to the right of Change My Password.



3. Click **OK**.

4. Click the **Save** button.

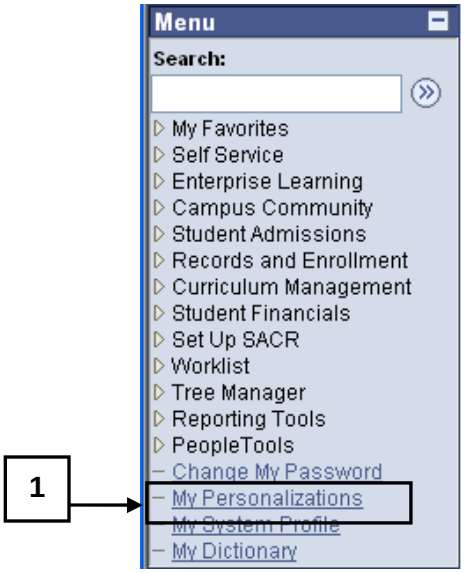

Edit Favorites
Click the Save button after editing or deleting favorites.
Favorites
Customize | Find |
First 1 of 1 Last
*Favorite
Sequence number
Community Directory Search
1
Delete
Save
Notify

16. PERSONALIZATIONS

USING MY PERSONALIZATIONS

PeopleSoft 9.0 provides a section where a user can create Personalization preferences. The My Personalizations link can be found near the bottom of the Menu pagelet.

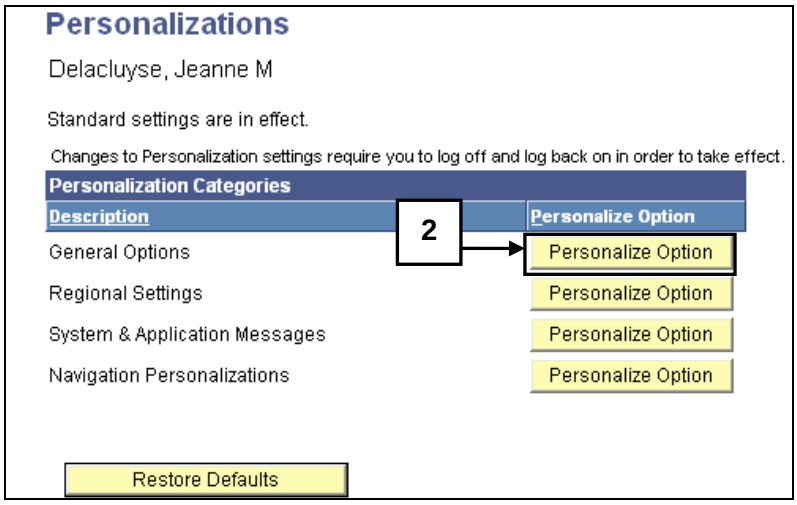
1. Click on My **Personalizations** in the Menu pagelet.



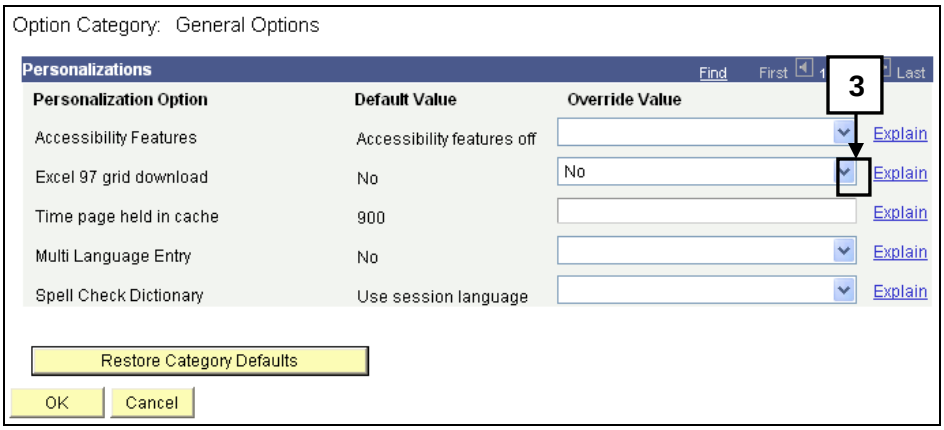
There are four areas that you can personalize:

- General Options
- Regional Settings
- System & Application Messages
- Navigation Personalizations

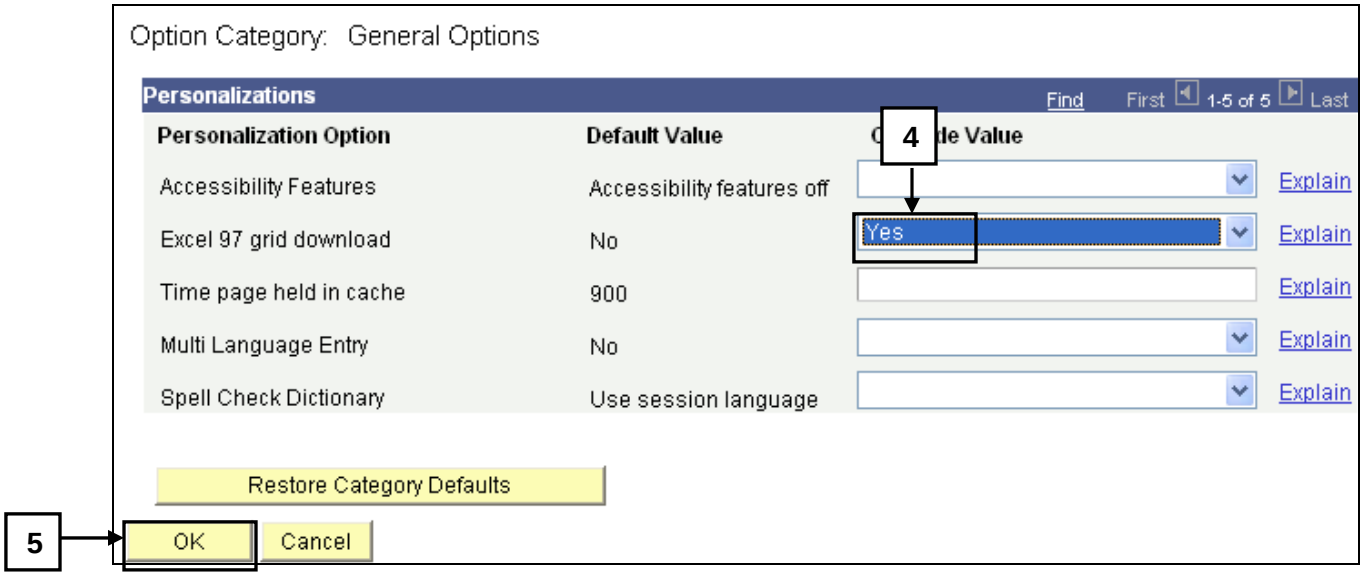
2. Click on the **General Options Personalize Option** button.



The following screen will appear.



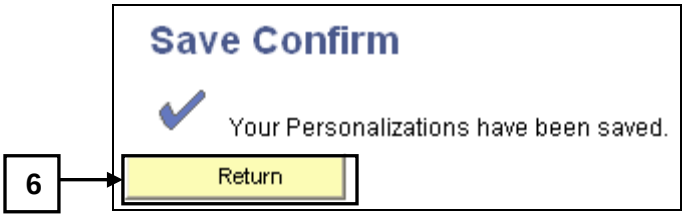
3. Click the **down arrow** to the right of No in the Excel 97 grid download area.
4. Select **Yes**.



We have now turned on, or activated, the download function in PeopleSoft.

5. Click **OK** to save this setting.

The following window will appear.



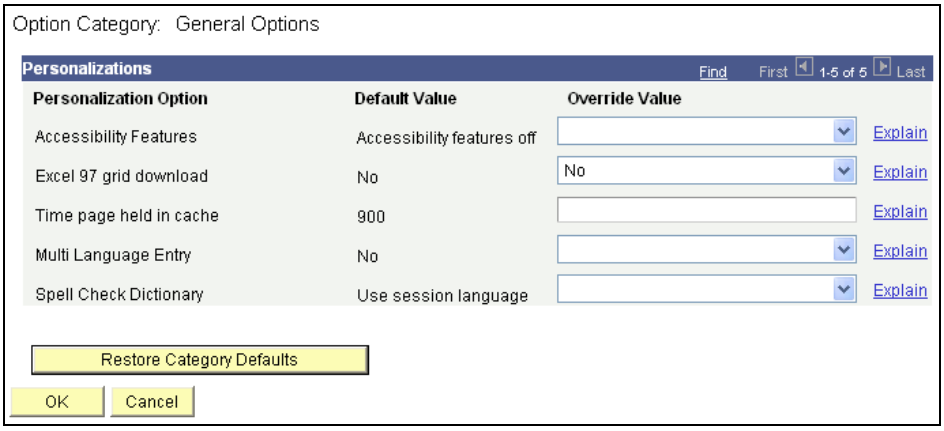
6. Click **Return**.

You will return to the Personalizations main window.

The table below provides information regarding the various column headings in the My Personalizations area.

Column Heading	Description
Option Category	Shows the description of the category of personalizations. This helps you to make sure that you have the correct category open.
Personalization Option	This column lists all of the personalization options available for you to modify. The text that appears in the list is a brief description of the option. For more information on the option, click the **Explain** link.
Default Value	Refers to the initial settings that your administrator has specified for the option. If you do not modify the default value, the option assumes the value provided by the system administrator.
Override Value	Enter any custom value you want to assign to the personalization option. To "override" a default setting means to "use in place of " the default setting.
Explain	Click this link to view more information on what the personalization option provides. See the following section for more information on the Explanation page.
Restore Category Defaults	Returns all modified options to the default values. This button applies only to the current category, as in the category you have open.
OK/Cancel	After you have made any modifications, click **OK** so that the system records your changes. If you do not want your changes recorded click **Cancel**. If you have not made any changes and just viewed the options, you can use either button to return to the Personalizations page.

To learn more about the options for personalization, you should read the Explain link, in each row, adjacent to each of the Personalization Options.

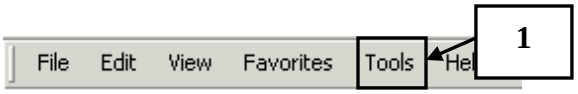


17. CLEARING YOUR BROWSER'S CACHE

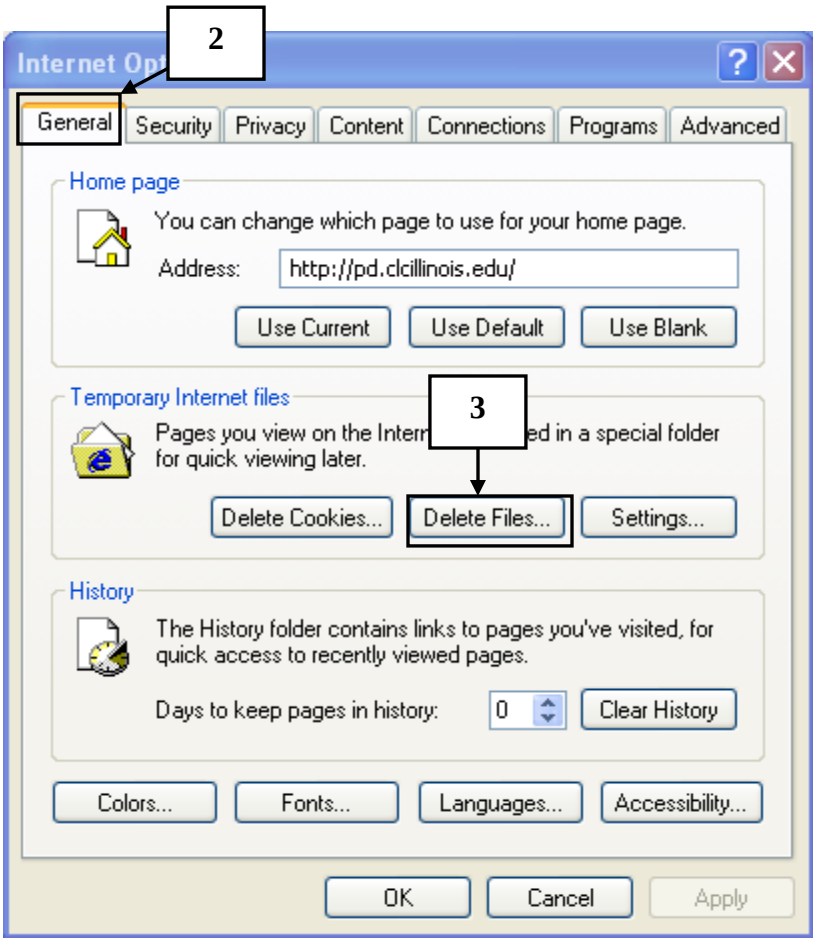
As you access Internet pages, including PeopleSoft pages, they get stored in a temporary file. As these files tend to build up over time, every so often you will want to clear out theses temporary Internet folders, otherwise known as your "cache". This should be done on a periodic basic. We recommend clearing out your cache at least monthly.

To clear out your "cache":

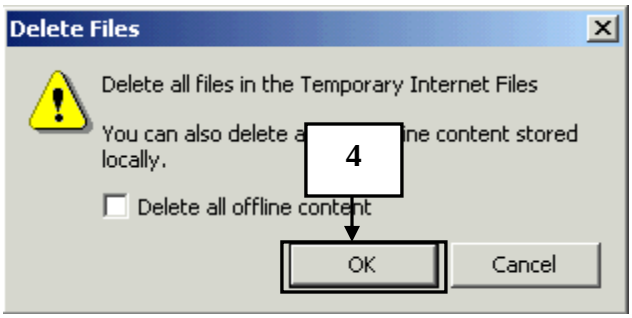
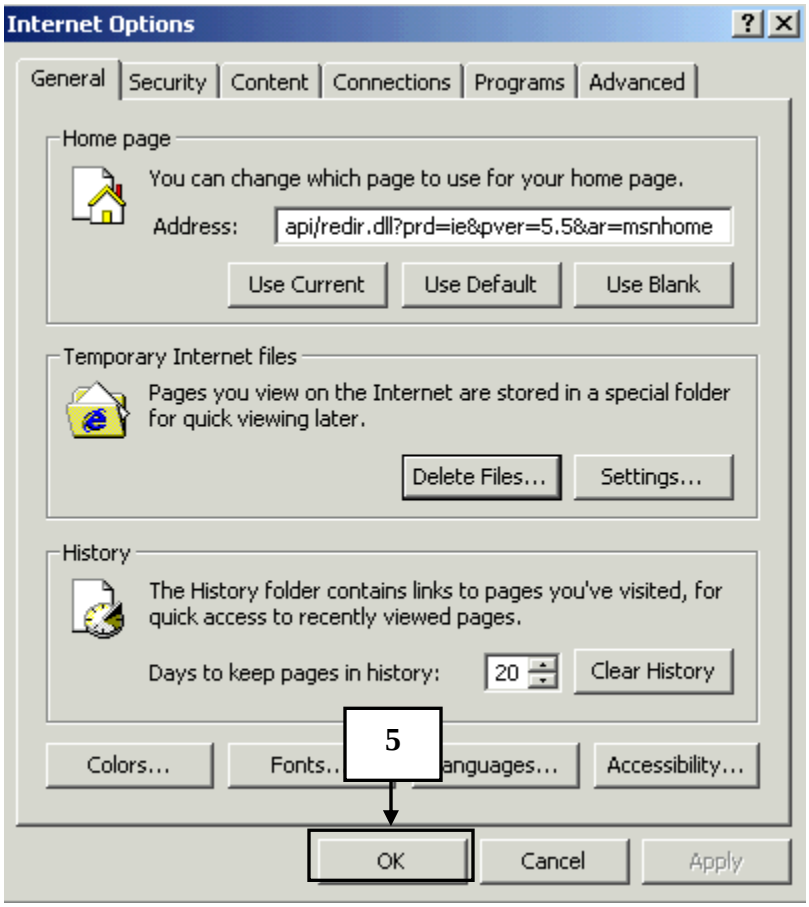
1. Click on the **Tools** button, on your browser menu and then select **Internet Options. . .**



2. Click on the **General** tab.
3. Click the **Delete Files** button.



4. Click **OK** on the Delete Files window.



5. Click **OK** on the Internet Options Window.